

Gift of Securities

Letter of Intention

Donation Instructions

DIOCESE OF LAFAYETTE

The Diocese of Lafayette maintains a brokerage account with Merrill Lynch for the purpose of processing stock transfers benefiting the Diocese, its parishes, schools and/or other related agencies.

Please complete this document in its entirety and mail, email or fax to:

Office of Stewardship and Development

1408 Carmel Drive

Lafayette, Louisiana 70501-5215

sjohnson@diolaf.org

(337) 261-5645

so that we may properly record your gift and acknowledge your kind act of stewardship.

The purpose of this transfer is to make a charitable contribution to the Diocese of Lafayette (Society of the Roman Catholic Church of the Diocese of Lafayette) or its entities – Tax Identification Number: 72-0437696. I (we) understand the securities will be sold upon receipt, and the full net proceeds of the sale of this stock will be credited in my (our) name(s).

† **DATE:** _____
(Month) (Day) (Year)

† **DONOR INFORMATION:**

Name: _____
(Name of individual(s) or entity making the gift)

Mailing Address: _____

City: _____ State: _____ Zip: _____

Telephone No.: _____

Email Address: _____

Affiliated Church Parish: _____

This gift is intended to benefit:

<input type="checkbox"/> Diocese of Lafayette (unrestricted)	<input type="checkbox"/> Diocese of Lafayette (restricted): _____ <small>(Designate)</small>
<input type="checkbox"/> Bishop's Services Appeal (BSA)	<input type="checkbox"/> Church Parish: _____ <small>(Specify)</small>
<input type="checkbox"/> Centennial Campaign: <i>BOFT</i>	<input type="checkbox"/> Catholic School: _____ <small>(Specify)</small>
	<input type="checkbox"/> Other entity: _____ <small>(Specify)</small>

† **SECURITIES BEING DONATED:**

Name of Security: _____ No. of Shares: _____ Amount: \$ _____

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† **DONOR'S BROKER/AGENT:**

Name: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Telephone No.: _____

Email Address: _____

† **DONOR(S) SIGNATURE(S):** _____

Check box if you wish for your gift to remain anonymous.

The above referenced shares are to be delivered to:
Merrill Lynch (DTC No. 8862)
Account No. 516-04174 (Account of the Diocese of Lafayette)

Please contact your broker/agent directly, as the Diocese of Lafayette is not able initiate stock transfers on your behalf. The Diocese must be notified of your gift by receipt of this form in order to properly identify electronically transferred stock gifts.

