

METHODS OF DONATING STOCK TO THE COMMUNITY OF THE GOOD SHEPHERD

Thank you for your interest in donating stock to the Community of the Good Shepherd. Following are the three methods available to you to complete a transfer to Good Shepherd. Please follow all the instructions for whichever method you choose. All items are necessary to insure that the transfer takes place, as you intend; all steps are important to insure that Good Shepherd is the recipient, and that Good Shepherd knows you are the donor.

Because of changes in the tax laws, we no longer list donations of stock on the year-end Report of Contributions statement. Upon completion of the transfer (receipt of the proceeds in Good Shepherd's business office), we will send a letter of acknowledgement with the proper IRS information/disclosures for your tax records.

- 1) Hand delivered. You may bring in certificates held in your name and sign them over to Good Shepherd. When you sign over the stock to Good Shepherd, only your name(s) as they appear on the certificate and the date you are signing over the stock is to be filled in on the back of the certificate. DO NOT complete any other part of the back of the certificate. A letter identifying the stock, the number of shares and your statement that you are donating this stock to the parish must accompany the stock and the letter must contain your written signature as shown on the certificate.
- 2) Sent by third party. You may have the certificate(s) sent here in the parish's name (send to the attention of Steve Singer). To identify the donor (since the stock comes through without your name on it), please send us a copy of the letter of instruction you send to the brokerage firm that is releasing the stock to us. A letter of intent from the donor need not be sent to the archdiocese along with the stock certificate when it is in the name of the parish. Note: If donating P & G stock through Shareholder Services, please request that a donor card be sent to the parish. When donating stock through P&G shareholder services you can request that they use Good Shepherd account #478003 at P&G and please keep the shares in the SIP account after the transfer.
- 3) To transfer stock by wire.
Wire transfers may be made through Merrill Lynch. Please include a letter of instruction at the time of transfer.

Company Name: Merrill Lynch
Contact Name: Ms. Erica Davis
E-Mail: EricaDavis@ml.com
Phone: (513) 579-3732

DTC Number: 5198
Account Number: 636-04193
Acct. Name: Archdiocese of Cincinnati

You must designate the parish and donor name on the trailer line when wiring stock.

Please send a copy of all instruction letters and donor letters (sample attached) naming the donor, type and number of shares, and the parish to which the donation is to be made to both of the following:

Mr. Steve Singer
Community of the Good Shepherd
8815 East Kemper Road
Cincinnati, OH 45249
(513) 489-8815
steve.singer@good-shepherd.org

Ms. Annie Lipps
Finance Office
Archdiocese of Cincinnati
100 E. Eighth Street
Cincinnati, OH 45202
alfinance@CatholicCincinnati.org

If you have any questions concerning these instructions, please call Steve Singer in the parish office.

SAMPLE DONOR LETTER
FOR DONATION OF STOCK
TO ACCOMPANY HAND DELIVERED CERTIFICATE

Date of Transfer

Dear _____,
(Pastor or Director)

I (We), donor name(s), am contributing number of shares of name of stock to Good Shepherd Church in Cincinnati.

I/We wish the proceeds to be used for (state intent or fund).

Sincerely,

Handwritten Signature Exactly as on Certificate

Return Address of Donor

Please make sure your signature on the letter of intent is the same as your name appears on the stock certificate. This letter must have an original signature and must accompany the physical stock certificate(s) issued in the donor(s) name.

**SAMPLE DONOR LETTER
FOR DONATION OF STOCK**
TO INFORM CHURCH OF WIRE TRANSFER OF STOCK
BROKERAGE TO BROKERAGE

(Date)

Dear _____:
(Pastor or Director)

I /We, _____, contributed _____
(Name of Donors) (Share #)

shares of _____
(Name of Stock)

to _____ in _____.
(Name of Church or Organization) (City)

I / We used Archdiocesan _____, _____
(Account #) (DTC #)

at _____. Please designate these
(Broker Name)

funds for _____.
(State Intent or Fund)

Sincerely,

(Signature)

COPY TO ARCHDIOCESE OF CINCINNATI
ATTENTION: ANNIE LIPPS

**SAMPLE DONOR LETTER
FOR DONATION OF STOCK
TO ACCOMPANY PHYSICAL STOCK CERTIFICATE**

(Date)

Dear _____:
(Pastor or Director)

I /We, _____, contribute _____
(Name of Donors) (Share #)

shares of _____
(Name of Stock)

to _____ in _____.
(Name of Church or Organization) (City)

I / We wish the proceeds to be used for _____.
(State Intent or Fund)

Sincerely,

(Sign Exactly as on Certificate)

**THIS LETTER MUST HAVE AN ORIGINAL SIGNATURE
AND MUST ACCOMPANY THE PHYSICAL STOCK CERTIFICATE(S)
ISSUED IN THE DONOR(S) NAME.**