

Transfer instructions for Donors with Stock or Mutual Fund Donations

For all gifts of stock:

A letter of authorization from the donor to the parish is required. A letter sample is attached. If you have any questions call Jim Buckley at the number indicated below. Fax a copy to Jim Buckley and Shannon Tan at 415-835-1848 and Haryanti Ng at 415-614-5516 or email to jbuckley@firstrepublic.com, stan@firstrepublic.com and ngh@sfarch.org.

STOCK CONTRIBUTIONS

A. Transfers from a Donor Account at a Brokerage House

Note: Donor's Broker must initiate transfer.

In addition to the letter mentioned above, please give the following information to the donor broker for transferring to the Archdiocesan broker. (Broker to Broker)

1. First Republic Securities Co., LLC
Attn: Jim Buckley Phone: 415-296-5839
Shannon Tan Phone: 415-249-5578
111 Pine Street Fax: 415-835-1848
San Francisco, CA 94111
Email: jbuckley@firstrepublic.com
stan@firstrepublic.com
2. First Republic Securities Co., LLC DTC #0443
3. S.F.Archdiocesan Account number is: **33L-070589**
4. Account Name: **Archdiocese of San Francisco**
5. Instruct your donor's broker to include the following information on the trailer line (second line) of their transfer instructions.
 - **FBO (provide Parish Name) and (Donor Name)**

NOTE: Failure to include the above information for each transfer will delay identifying the donation and could cause us not to acknowledge the donation in timely manner.

B. Stock Certificates donated directly by Donor

1. Instruct the donor to deliver the stock certificate and an executed stock power to your Parish Office.
2. OR they can deliver their stock certificate and an executed stock power form (via registered mail) to First Republic Securities at the above address. A letter of authorization must accompany the stock certificate and executed stock power.

Date: _____

Jim Buckley
First Republic Securities Co., LLC
111 Pine Street
San Francisco, CA 94111

Re:

Dear Mr. Buckley:

Please accept this as your authorization to deposit _____ shares of
_____ stock into account no. 33L-070589, for the Archdiocese of
San Francisco.

This donation is for the benefit of _____ Parish/School.

Sincerely,

Customer Signature

PRINT NAME

Joint Customer Signature

PRINT NAME

Phone Number: _____

Email address: _____

Email copy to ngh@sfarch.org at (415) 614-5516