

DONATION OF COMMON STOCK TO ST. COLUMBAN

The donation of common stock is one of the many ways to support our Parish Mission. This document will explain the process of donating common stock to Saint Columban. We appreciate your willingness to share in the support of the wonderful efforts of our faith community to build up the kingdom of God here in Loveland!

The Archdiocese serves as the broker for Saint Columban and the other parishes of the Archdiocese; they have several methods available for the contribution of stock. The following methods pertain to common stock donations only. Please contact Annie Lipps of the Archdiocesan Finance Office regarding the donation of other securities such as mutual funds, book entry, or employee held (i.e. Procter & Gamble, GE) account transfers.

METHODS FOR DONATING STOCK

Actual Physical Certificate:

Certificates held in the name of the Saint Columban may be delivered to Father Larry Tensi or Mr. Patrick Leshner at the parish office. A letter from the parish including the donor name must accompany the certificate stating the church's wish to redeem the shares. If mailing certificates, please send them certified mail for security reasons.

Certificates held in the name of the **donor(s) must be endorsed by the donor(s) exactly as stated on the front side of the certificate**. Except for the signature lines, please leave all other lines on the back of the certificate blank. All certificates held in the name of the **donor(s) must be accompanied by a letter stating that it is the donor(s)' intention to donate the stock to Saint Columban**. The donor(s) letter must identify the stock, number of shares, and include handwritten signatures exactly as stated on the front side of the certificate. All paperwork **MUST** be original.

Electronic / DTC Transfer:

The Archdiocese of Cincinnati maintains two general accounts that can receive electronic / DTC transfers of stock from a donor brokerage account directly into our brokerage account. Please have the donor contact Annie Lipps 421-3131(ext. 400) to obtain the correct procedure for the transfer of shares directly into an Archdiocesan account for the benefit of Saint Columban. Please explain to the donor that a copy of the instruction letter to their broker and/or our donor letter must be sent to the church and Archdiocese.

- Note that with each method of stock donation it is imperative that every step is followed carefully to insure that the donation takes place as intended; with Saint Columban as the recipient and the donor receiving the proper acknowledgement. Please identify all stock donations with the donor name.
- Have the donor copy the Archdiocese and Saint Columban on all instruction letters (donor letters to broker) and donation letters (donor letter to parish) to insure compliance with the donor's wishes.

Contact Annie Lipps of the Archdiocesan Finance Office, by phone (513)421-3131 ext. 400, by fax (513)421-6225, or by email alipps@CatholicCincinnati.org if you have any questions.

(Date)

Dear Father Tensi,

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

shares of _____
(Name of Stock)

to Saint Columban in Loveland, Ohio 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.**