

## GIFTS OF STOCK OR FUND SHARES

*If your stock or securities are held electronically at a brokerage firm:*

- ❖ When wiring securities to the Archdiocese of Kansas City in Kansas, it is important that you communicate to your brokerage firm the exact information as follows:
  - Archdiocese of Kansas City in Kansas Brokerage Account
  - UBS, DTC #221
  - For the benefit of the Archdiocese of Kansas City in Kansas, **NAME OF RECIPIENT**, Account #EI-50985-66
  
- ❖ In addition to instructing your brokerage firm to wire securities, send an email to [stewdev@archkck.org](mailto:stewdev@archkck.org) with the following information:
  1. Donor's name and address for tax receipt letters
  2. Stock name and ticker symbol
  3. Number of shares
  4. Expected date of transfer
  5. What the proceeds of the stock gift is to benefit; i.e. name and address of parish, school, cemetery, endowment or fund at the Catholic Foundation of Northeast Kansas, the Archdiocese of Kansas City in Kansas, or a specific ministry or campaign within the archdiocese.

*If you hold the stock certificates or securities:*

- ❖ Contact the archdiocesan Stewardship & Development Office (913/647-0325) in order to receive the appropriate forms and materials.
- ❖ Mail or hand-deliver (in envelopes provided by the Stewardship & Development Office) the certificate(s) and the completed forms to the Stewardship & Development Office. Please use separate envelopes for each.

***Please note that the value of any gift of appreciated stock or securities is valued on the date it is received by the Archdiocese of Kansas City in Kansas. The gift's value is determined by using the average of that day's high and low figures for those shares received.***