



# Saint Raphael the Archangel Catholic Church

To See as Christ Sees and Love as Christ Loves

## **STOCK DONATION INSTRUCTIONS**

Gifts of stock may be made via electronic transfer. St. Raphael maintains a brokerage account with Wells Fargo Advisors for the purpose of processing stock transfers to St. Raphael for the benefit of St. Raphael. **St. Raphael cannot initiate stock transfers on your behalf. You must contact your broker directly.**

### **PLEASE PROVIDE ALL INFORMATION REQUESTED:**

#### **NOTICE OF STOCK DONATION:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ (work) \_\_\_\_\_ (home)

**Name of stock and shares donated:** \_\_\_\_\_

Please apply my gift towards: (Offertory, Debt Reduction, etc.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**If securities are electronically transferred, the gift date is the date the securities enter our account at Wells Fargo Advisors. For hand-delivered securities to St. Raphael or Wells Fargo Advisors, the gift date is the date received. If the securities are mailed to St. Raphael, the gift date is the date of the mailing (recommend sending by registered mail). Stock market fluctuations after the date of delivery (as defined above) will not affect the charitable deduction for tax purposes.**

**Wells Fargo Advisors has instructions to sell stock as soon as possible (usually by the business day following their receipt of the stock). The actual net proceeds from the sale represent the amount that will be applied as you requested above. The net proceeds will be affected by the actual sale price, as well as a broker charge to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceeds applied from the gift. St. Raphael or The Diocese cannot be responsible for any variance in these amounts.**

**Please send copies of Pages 1 and 2 to:**

**Sherry Hiltbrunner - hiltbrunners@saintraphael.org  
St. Raphael Catholic Church  
5801 Falls of Neuse  
Raleigh, NC 27609  
Office: (919) 865-5732 Fax: (919) 865-5701**

**A. ELECTRONIC TRANSFER BY BROKER**

**Please communicate the following information to your broker**

To: \_\_\_\_\_  
(Broker's Name & Company)

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ stock from my  
Account \_\_\_\_\_ to:

Wells Fargo Advisors, LLC  
3105 Glenwood Avenue, Suite 201  
Raleigh, NC 27612  
Dave Purdy - (919) 782-1200

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

**B: DIRECT DONATION OF CERTIFICATE**

1. If certificate is titled in the name of the donor:
  - a. Sign certificate
  - b. Include a "letter of intent" with your name, address, stock and shares and intent (e.g., Offertory, Debt Reduction, etc).
  - c. Send by registered mail (or deliver) to St. Raphael or the Wells Fargo Advisors office (see above address).
  - d. Send copy of this two page completed form to St. Raphael.
  
2. If certificate is titled in the name of St. Raphael:
  - a. Send by registered mail (or deliver) to St. Raphael, along with this two page completed form.

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