

DONATING STOCK TO THE
“BUILDING OUR FUTURE...TOGETHER IN FAITH”
CAPITAL CAMPAIGN

After you have checked with your tax advisor to be sure that this scenario applies to you, here's how you donate stock to St. Patrick Church, Carlsbad. It should take you two phone calls and about 30 minutes of your time.

Step 1:

Contact your stockbroker and tell them that you want to make a stock donation to St. Patrick Church, Carlsbad. Your broker can contact the Diocese's broker listed below. They will need you to provide the following information:

Merrill Lynch

Kayln Maher

Email: kalyn~maher@ml.com

Direct line: 760-930-3124

Phone number: 800-925-8048

Fax #: 760-670-3548

DTC #: 5198

Acct # 232-04209(Roman Catholic Bishop of San Diego)

St. Patrick Catholic Church Carlsbad, is considered an entity of the Roman Catholic Bishop of San Diego, a corporation sole. It is for this reason that the stock must be transferred to the Roman Catholic Bishop of San Diego. Your broker will facilitate the transfer. **When this is completed, the Parish will receive the proceeds of your donation, (net of selling costs.)**

The Diocese of San Diego will provide you with a letter confirming that the shares have been transferred and the valuation for tax purposes at the time of transfer.

Step 2:

Since this account is for the Diocese and not St. Patrick Catholic Church in particular, you will need to inform the Diocese that the donation is for the benefit of the St. Patrick Catholic Church in Carlsbad. You may keep both the Diocese and the Parish informed of your transaction by faxing or mailing the **Stock Donation Form** to both parties. You do not have to wait for your broker's confirmation letter before proceeding with this step. The Diocese cannot do anything until the donor has made the gift and the stock is the Diocese's possession to sell.

If you would like assistance, please contact our Capital Campaign Office at St. Patrick Church (760) 729-0717 or the Diocesan Office of Stewardship & Development at (858) 490-8316.

Step 3:

Complete your **Letter of Intent** and **Stock Donation Form** and return it to the Campaign Office, or scan and e-mail the **Stock Donation Form** to the Diocese at stockdonations@diocese-sdiego.org. We thank you in advance for your generosity.

The Diocese of San Diego's instructions for stock donations may be found online at:
<http://www.diocese-sdiego.org/2009website/2009stockdonations.html>

St. Patrick Catholic Church Capital Campaign Office

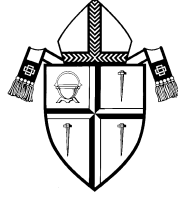
3321 Adams Street

Carlsbad, CA 92008

Phone: (760) 729-0717

Fax: (760-434-3325)

Diocese of San Diego



Stock Donation Form

1. Diocese of San Diego broker stock is being transferred to: *(please check one.)*

Merrill Lynch

Please do not transfer shares to any other account other than Merrill Lynch.

2. Estimated date of transfer of shares *(enter date)* : _____

3. Parish Name: St. Patrick Church, Carlsbad

4. Parish contact person: Deacon Mike Frazee

5. Designation of donation *(if more than one, please indicate % to each)* :

6. Information about donor:

A. Donor's Name: _____

B. Donor's Address *(include street, city, state and zip code)* :

C. Donor's phone number: _____

D. Donor's fax number *(if available)* : _____

E. Donor's email address: _____

7. Information about donation:

A. Stock/Security Name: _____

B. Stock/Security Symbol: _____

C. Number shares donated: _____

D. Total estimated value of donation: _____

EMAIL FORM TO stockdonations@diocese-sdiego.org