

DIOCESE OF LAFAYETTE

Gift of Securities Letter of Intention Donation Instructions

The Diocese of Lafayette maintains a brokerage account with Merrill Lynch to receive stock transfers benefiting the Diocese, its parishes, schools and/or other related agencies.

Please contact your broker/agent directly to make the transfer, as the Diocese of Lafayette is not able to initiate stock transfers on your behalf.

Additionally, the Diocese must be notified of your gift by receipt of this form in order to properly identify electronically transferred stock gifts.

Please complete this document in its entirety and mail, email or fax to:

Office of Stewardship and Development

1408 Carmel Drive

Lafayette, Louisiana 70501-5215

lsuire@diolaf.org

fax: (337) 261-5645

The purpose of this transfer is to make a charitable contribution to the Diocese of Lafayette (Society of the Roman Catholic Church of the Diocese of Lafayette) or its entities – Tax Identification Number: 72-0437696. I (we) understand the securities will be sold upon receipt, and the full net proceeds of the sale of this stock will be credited in my (our) name(s).

† **DATE:** _____

† **DONOR INFORMATION:**

Name: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Telephone No.: _____

Email Address: _____

Affiliated Church Parish: _____

This gift is intended to benefit:

Diocese of Lafayette (unrestricted)

Bishop's Services Appeal (BSA)

Diocese of Lafayette (restricted): _____

Church Parish: _____

Catholic School: _____

Other entity: _____

† **SECURITIES BEING DONATED:**

Name of Security: _____ No. of Shares: _____ Amount: \$ _____

Name of Security: _____ No. of Shares: _____ Amount: \$ _____

† **DONOR'S BROKER/AGENT:**

Name: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Telephone No.: _____

Email Address: _____

† **DONOR(S) SIGNATURE(S):** _____

Check box if you
wish for your gift
to remain anonymous.

**The above referenced shares are to be delivered to:
Merrill Lynch (DTC No. 8862)
Account No. 516-04174 (Account of the Diocese of Lafayette)**



DIOCESE OF LAFAYETTE
OFFICE OF STEWARDSHIP AND DEVELOPMENT
1408 CARMEL DRIVE
LAFAYETTE, LOUISIANA 70501-5215

THE BURGE GROUP (RANDALL B. BURGE, CFP®)
MERRILL LYNCH, PIERCE, FENNER & SMITH INC.
900 SOUTH COLLEGE ROAD, SUITE 105
LAFAYETTE, LOUISIANA 70503

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