

SECURITIES DONATION NOTIFICATION FORM

Thank you for your decision to make a gift of securities. We very much appreciate your support.

On the other side of this sheet are instructions about how to transfer securities to the Diocese.

To make sure your gift is properly applied, please provide the information requested below. Send this form to

Mrs. Laurie Downey, Controller
Roman Catholic Diocese of Portland
510 Ocean Ave
Portland ME 04103-4936

You may fax the form to us:

207-773-0182

Or you may e-mail information to

laurie.downey@portlanddiocese.org

We also suggest you send a copy to your broker — or, if not a copy, the information about the purpose of the gift.

1. Donor's Name: _____
2. Donor's Address: _____

3. Brokerage Firm and location (for example, "Smith Barney, Portland, Maine"): _____
4. Broker's Name (if applicable): _____
5. Date on which the securities are being transferred to the Diocese: _____
6. Purpose of the Gift (please check as many as apply; if more than one, show the desired % distribution):
 - ☐ For the benefit of a parish (show name and city): _____
 - ☐ For the Catholic Appeal — credit to _____ Parish. Pledge Amt: _____
 - ☐ For the benefit of a Catholic elementary or high school: _____
 - ☐ For the benefit of another entity — please identify: _____
7. On the line(s) at the left below, please list the name of each security, the number of shares being donated, and the estimated value (e.g., "XYZ Corp., 50 shares, \$1,000"). Use extra sheets, if necessary. *(Please leave blank the area to the right of the double line.)*

	Security	# of Shares	Estimated Value
a.	_____		
b.	_____		

For Office use only — to compute value of
gift

Date Received	Hi	Lo	Ave	Total

Note 1: We will send you a letter that will confirm your donation for tax-deduction purposes. It will show the amount you may deduct and how it was computed.

Note 2: If this donation is a pledge for the Bishop's Appeal, please either include an Appeal Gift Form showing the intended pledge or enter your pledge amount on this form. We will let you know if the selling price of the securities is less than the pledge.