



## LETTER OF INTENT FOR A GIFT OF SECURITIES

Thank you for your support. Please send this completed form to your broker and ATTN: Mrs. Cerita Young, Business Office of The Ordinariate of the Chair of Saint Peter, PO Box 55206, Houston, TX 77255 or [business@ordinariate.net](mailto:business@ordinariate.net). Failure to send a copy to the Finance Office may delay the distribution of your donation.

Date: \_\_\_\_\_

From: (Donor) \_\_\_\_\_

To: (Broker) \_\_\_\_\_

**The purpose of this transfer is to make a charitable contribution to:**

**PERS ORDINARIATE CHR ST PETER**

7730 Westview Dr., Houston, TX 77255  
Tax I.D. #45-4161282.

Please complete one of the following options:

☐ **I/We wish to transfer shares from my existing Brokerage Account:** Please be advised that I, the undersigned, hereby request that \_\_\_\_\_ shares of \_\_\_\_\_ be transferred from my account, # \_\_\_\_\_ at \_\_\_\_\_ (broker) to the Ordinariate of the Chair of Saint Peter **account No: Z40-139578** at Fidelity Investments **DTC# 0226**.

☐ **I/We wish to donate a Stock Certificate(s) that is/are registered in my name:** Certificate # \_\_\_\_\_ Registered in the name of \_\_\_\_\_ #Shares \_\_\_\_\_ Issuer \_\_\_\_\_

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**I/We direct the Ordinariate Finance Office to designate the proceeds of this donation as follows:**

☐ For the benefit of my Parish/Community, \_\_\_\_\_  
Name of Parish/Community City

☐ General Parish Fund ☐ Building Fund ☐ Other (please specify) \_\_\_\_\_

Please send acknowledgement of the completed transfer to the following address:

Address: \_\_\_\_\_ Phone#: (\_\_\_\_) - \_\_\_\_ - \_\_\_\_  
\_\_\_\_\_

Signed:

\_\_\_\_\_  
Print Donor Name

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Print Donor Name (joint account)

\_\_\_\_\_  
Donor Signature (joint account)

For assistance please contact: the Business Office at 713.609.9292 or [business@ordinariate.net](mailto:business@ordinariate.net).