

DIOCESE OF LAFAYETTE STOCK DONATION PROCEDURE

Thank you very much for your interest in donating stock to the Diocese of Lafayette. To complete your donation, please follow the steps outlined below. If you need further assistance, please call the Office of Stewardship and Development at (337) 261-5641.

1. Complete and mail the Stock Donation Letter of Intention

To begin the process of donating stock, please complete the Stock Donation Letter of Intention. Mail, fax, or e-mail the Letter of Intention to the Office of Stewardship and Development and if the donation is intended for an institution other than the Diocese itself, please send a copy to the parish, school or other institution for which the donation is intended. Without this Letter of Intention, we will not know where to send the proceeds of the donation.

Address: Office of Stewardship and Development - 1408 Carmel Drive – Lafayette, LA 70501

Fax: (337) 735-9440

Email: SJohnson@diolaf.org

2. Transfer the Stock

After the Letter of Intention is received, you will be notified to transfer the securities as follows:

Request that your bank or broker notify Randy Burge at Merrill Lynch of the electronic transfer. His phone number is (337) 265-2028.

3. Payment Processing and Acknowledgment of Donation

The Office of Stewardship and Development of the Diocese of Lafayette acts as a clearing house for donations of stocks. When stocks are donated, the diocesan brokerage firm liquidates them and sends the net proceeds to the Diocese of Lafayette along with a trade confirmation form. The Diocese of Lafayette will then send the net proceeds and a copy of the trade confirmation form to the parish, school or other institution that is the final intended recipient of the donation. The Diocese will only know where to forward this payment based on the information provided in the Letter of Intention (see #1 above).

The donor can expect to receive acknowledgment of his or her contribution from the final recipient (parish, school or other institution) and not from the Office of Stewardship and Development. Acknowledgment should include pertinent information about the donation, including the date of the donation, description of the stocks, and the number of shares. The acknowledgment should not include a valuation of the donation. It is the responsibility of the donor to establish the value of the donation for his or her tax purposes (per IRS regulations).

**DIOCESE OF LAFAYETTE
STOCK DONATION LETTER OF INTENTION**

To the donor: Please complete this form for all stock donations. If you need further assistance, please call Shane Johnson at the Office of Stewardship and Development at (337) 261-5641.

Date: _____

Shane Johnson, Director
Office of Stewardship and Development
1408 Carmel Drive
Lafayette, LA 70501

Dear Mr. Johnson:

I have directed my broker at _____, whose phone number is _____
(Insert name of brokerage firm here)

to transfer:

_____ shares of _____ stock
_____ shares of _____ stock
_____ shares of _____ stock

to the diocesan investment account that is held at Merrill Lynch and is managed by Randall Burge (337) 265-2028. I understand that the securities will be sold upon receipt by Merrill Lynch and that the full net proceeds of the sale of this stock will be credited in my name,
_____ to be applied as follows:

(Example):

_____	_____	_____
Name of Recipient Organization – City	# of Shares	Amount
_____	_____	_____
Name of Recipient Organization – City	# of Shares	Amount
_____	_____	_____
Name of Recipient Organization – City	# of Shares	Amount

Sincerely,

(Please complete all of the information below for verification purposes)

Name of Donor _____

Address: _____

Phone Number: _____

(To Confirm Intent & Inform Receipt of Proceeds)

I wish to remain anonymous.