

Roman Catholic Diocese of Houma-Thibodaux

STOCK DONATION INSTRUCTIONS

Gifts of stock may be made via electronic transfer. The Diocese of Houma-Thibodaux maintains two brokerage accounts one with Edward Jones Investments and the other with JPMorgan Chase for the purpose of processing stock transfers to the Diocese for the benefit of the Diocese or any of its parishes, schools, or agencies. [The Diocese can not initiate stock transfers on your behalf. You must contact your broker directly.](#)

PLEASE PROVIDE ALL INFORMATION REQUESTED:

NOTICE OF STOCK DONATION:

Name: _____ Parish: _____

Address: _____
(Street) (City) (State) (Zip)

Phone: _____ (work) _____ (home)

Name of stock and shares donated: _____

Please apply my gift towards: (ABA, Offertory, Capital Campaign, etc.)

If securities are electronically transferred, the gift date is the date the securities enter our account at either JPMorgan Chase or Edward Jones Investments. For hand-delivered securities to the Diocese, JPMorgan Chase, or Edward Jones Investments, the gift date is the date received. If the securities are mailed to the Diocese, the gift date is the date of the mailing (recommend sending by registered mail). Stock market fluctuations after the date of delivery (as defined above) will not affect the charitable deduction for tax purposes.

Both JPMorgan Chase and Edward Jones Investments has instructions to sell stock as soon as possible (usually by the business day following their receipt of the stock) The actual net proceeds from the sale represent the amount that will be applied as you requested above. The net proceeds will be affected by the actual sale price, as well as a broker charge to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceeds applied from the gift. The Diocese can not be responsible for any variance in these amounts.

Please send copies of Pages 1 and 2 to:

William J. Barbera – bbarbera@hdiocese.org
P.O. Box 505
Schriever, LA 70395
(985)850-3112; Fax (985) 868-7727

A. ELECTRONIC TRANSFER BY BROKER

- Please communicate the following information to your broker

To: _____
(Broker's Name & Company)

Please transfer _____ shares of _____ stock from my
Account _____ to:

Please select one of the following:

JPMorgan Chase
Marguerite Knight- (985) 873-6057
Roman Catholic Diocese
of Houma-Thibodaux
ACCOUNT # PYH-331350
DTC # 0226

Edward Jones Investments
Bill Hochstetler – (985) 446-9440
Roman Catholic Diocese
of Houma-Thibodaux
ACCOUNT # 706-11219-1-4
DTC # 0057

I / We herby authorize the above stock transfer:

(Signature) (Date) (Signature) (Date)

B: DIRECT DONATION OF CERTIFICATE

1. If certificate is titled in the name of the donor:
 - a. Sign certificate
 - b. Include a “letter of intent” with you name, address, stock and shares and intent (e.g., Diocese of Houma-Thibodaux – Annual Bishop’s Appeal)
 - c. Send by registered mail (or deliver) to the Diocese.
 - d. Send copy of this two page completed form to the Diocese
2. If issuing a certificate it should be titled as follows: “The Roman Catholic Church Diocese of Houma-Thibodaux for the benefit of (diocese, agency, or institution.)
 - a. Send by registered mail (or deliver) to the Diocese, along with this two page completed form.

PLEASE SEND COPIES OF PAGES 1 AND 2 TO:

William J. Barbera – bbarbera@htdiocese.org
P.O. Box 505
Schriever, LA 70395
(985) 850-3112; Fax (985) 868-7727