

Transfer instructions for Stock or Mutual Fund Donations

For all gifts of stock

A Letter of Authorization from the donor to the parish or entity is required. A sample of the letter is attached.

Email a copy of the Letter of Authorization to Jim Buckley (jbuckley@firstrepublic.com) and Haryanti Ng (ngh@sfarch.org), or fax a copy to Jim Buckley at 415-296-5839. If you have any questions call Jim Buckley at (415-296-5839) or Haryanti Ng at 415-614-5516.

A. Transfers from a donor's account at a brokerage house

The donor's broker must initiate the transfer. In addition to the Letter of Authorization, please give the following information to the donor's broker for the transfer to the Archdiocesan broker (broker to broker).

1. First Republic Securities Co., LLC
Attn: Jim Buckley
111 Pine Street
San Francisco, CA 94111
Phone: 415-296-5839
Fax: 415-364-4509
Email: jbuckley@firstrepublic.com
2. First Republic Securities Co., LLC **DTC #0443**
3. S.F. Archdiocesan Account number is: **33L-070589**
4. Account Name: **Archdiocese of San Francisco**
5. Instruct your donor's broker to include the following information on the trailer line (second line) of their transfer instructions.

- **FBO (provide Parish Name) and (Donor Name)**

**** Failure to include the above information for each transfer will delay identifying the donation and *could* cause the Archdiocese to not acknowledge the donation in timely manner.**

B. Stock Certificates given directly by the donor

1. Ask the donor to deliver the stock certificate and an executed stock power to your parish office.
2. **OR** they can deliver their stock certificate and an executed stock power form (via registered mail) to First Republic Securities at the above address. A Letter of Authorization must accompany the stock certificate and executed stock power.

Date: _____

Jim Buckley
First Republic Securities Co., LLC
111 Pine Street
San Francisco, CA 94111

Re:

Dear Mr. Buckley:

Please accept this as your authorization to deposit _____ shares of
_____ stock into account no. 33L-070589, for the Archdiocese of San
Francisco.

This donation is for the benefit of _____ Parish/School.

Sincerely,

Customer Signature

PRINT NAME

Joint Customer Signature

PRINT NAME

Phone Number: _____

Email address: _____

Email copy to ngh@sfarch.org at (415) 614-5516