

DONATING STOCK TO THE
"BUILDING OUR FUTURE...TOGETHER IN FAITH"
CAPITAL CAMPAIGN

After you have checked with your tax advisor to be sure that this scenario applies to you, here's how you donate stock to St. Patrick Church, Carlsbad. It should take you two phone calls and about 30 minutes of your time.

Step 1:

Contact your stockbroker and tell them that you want to make a stock donation to St. Patrick Church, Carlsbad. Your broker can contact the Diocese's broker listed below. They will need you to provide the following information:

The Such Group/Merrill Lynch

Shawna or Michael Such

1000 Aviara Parkway, Suite 200, Carlsbad, CA 92011

Phone: 760-930-3116

Shawna_Such@ml.com

DTC #: 5198

Acct # 232-02092 (Roman Catholic Bishop of San Diego)

St. Patrick Catholic Church Carlsbad is considered an entity of the Roman Catholic Bishop of San Diego, a corporation sole. It is for this reason that the stock must be transferred to the Roman Catholic Bishop of San Diego. Your broker will facilitate the transfer. **When this is completed, the Parish will receive the proceeds of your donation, (net of selling costs.)**

The Diocese of San Diego will provide you with a letter confirming that the shares have been transferred and the valuation for tax purposes at the time of transfer.

Step 2:

Since this account is for the Diocese and not St. Patrick Catholic Church in particular, you will need to inform the Diocese that the donation is for the benefit of the St. Patrick Catholic Church in Carlsbad. You may keep both the Diocese and the Parish informed of your transaction by faxing or mailing the **Stock Donation Form** to both parties. You do not have to wait for your broker's confirmation letter before proceeding with this step. The Diocese cannot do anything until the donor has made the gift and the stock is the Diocese's possession to sell.

If you would like assistance, please contact our Capital Campaign Office at St. Patrick Church (760) 729-0717, or the Diocesan Office of Stewardship & Development at (858) 490-8294.

Step 3:

Complete your **Letter of Intent** and **Stock Donation Form** and return it to the Campaign Office, or scan and e-mail the **Stock Donation Form** to: StockDonations@diocese-sdiego.org. You can also fax it to the Diocese (858) 490-8398. We thank you in advance for your generosity.

The Diocese of San Diego's instructions for stock donations may be found online at: <http://www.diocese-sdiego.org> and look under "Giving"

St. Patrick Catholic Church Capital Campaign Office

3321 Adams Street

Carlsbad, CA 92008

Phone: (760) 729-0717

Fax: (760-434-3325)



Diocese of San Diego Stock Donation Form



Parish Name:		St. Patrick Parish, Carlsbad		Parish Contact:		Mary McLain	
<u>Donor Information:</u>							
Donor's Name:							
Donor's Address:							
Street:							
Street:							
City:		State:		Zip Code:			
Donor's phone number:						(Phone Type)	
<u>Information about your donation:</u>							
Stock/Security Name:							
Stock/Security Symbol:							
Number shares donated:							
Total estimated value of donation:							
Estimated date of transfer of shares:							
Designation of donation (e.g. Parish, Parish Building Fund, Parish School, Parish School Building Fund, Dioceses Program, Etc) - if more than one, please indicate % to each							

E-mail your donation form to: Shawna_such@ml.com and stockdonations@sdcatholic.org
Hard copies may be sent to: Attn: Office for Development, PO Box 85728, San Diego, CA 92186

Please note the proper account title is as follows: Roman Catholic Bishop of San Diego

Donors will receive an acknowledgment letter from the Diocese of San Diego within four weeks of transferring their shares to Merrill Lynch.

For questions on sending your gift:

Shawna or Michael Such
 The Such Group/Merrill Lynch
 1000 Aviara Parkway, Suite 200, Carlsbad, CA 92100
Shawna_Such@ml.com
 760-930-3116

For questions on donations:

Mark Fisher, CPA, CGMA
 Chief Financial Officer
 Diocese of San Diego
mfisher@sdcatholic.org
 858-490-8316