

# Roman Catholic Diocese of Houma-Thibodaux

## STOCK DONATION INSTRUCTIONS

Gifts of stock may be made via electronic transfer. The Diocese of Houma-Thibodaux maintains a brokerage account with Edward Jones Investments 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, parish, school, etc.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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If securities are electronically transferred, the gift date is the date the securities enter our account at Edward Jones Investments. For hand-delivered securities to the Diocese 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.

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:

Glenn J. Landry, Jr. – [glandry@htdiocese.org](mailto:glandry@htdiocese.org)  
P.O. Box 505  
Schriever, LA 70395  
(985)850-3112; Fax (985) 850-3212

**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:

**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)

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**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 certificate is titled in the name of the Diocese:
  - a. Send by registered mail (or deliver) to the Diocese, along with this two page completed form.

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