

Stock Donation and Mutual Fund Form for:



Please use this form to **alert us** that you are initiating a transfer of a stock or mutual fund to our account. You will also need to send a separate letter to your broker, detailing your donation of stock.

Mr. Matthew Zimmermann
c/o Ms. Chris Farmer
Catholic Charities, Diocese of Arlington
200 North Glebe Road, Suite 811
Arlington, VA 22203

FAX: (703) 528-3057
Phone: (703) 841-3896
Email: christine.farmer@arlingtondiocese.org

Dear Mr. Zimmermann:

Please accept this as notification that I am donating the following shares of stock/mutual fund, currently held in my account at:

Name of Bank or Brokerage Firm: _____

Shares of: _____ (e.g. IBM)

Stock/Mutual Fund Symbol: _____ (e.g. MSFT for Microsoft Corp.) Number of Shares: _____

In separate writing, I will instruct the agent who administers my account to transfer these shares to:

Catholic Charities, Diocese of Arlington **A/C# PQ1-609219, DTC #0443** Pershing, LLC

Please note if this gift to Catholic Charities is designated to a particular program area:

If I hold actual certificates, I will call the representative of McLaughlin Ryder Investments listed below for delivery instructions.

Signature of Donor(s): _____ Date _____

Printed Name of Donor(s) _____

Address: _____

City, State, Zip: _____

Phone Number: () _____ Email: _____

Please give a copy of this form and your separate instruction letter to your advisor and send copies of this form to:

- *McLaughlin Ryder Investments, Inc. (address/FAX listed below) and*
- *Mr. Matthew Zimmerman, CFO (address/ FAX listed above)*

For Communication to Catholic Charities, Diocese of Arlington:

Please use the contact information at the top of this page.

For Communication to McLaughlin Ryder Investments:

McLaughlin Ryder Investments, Inc.
Attention: Ms. Mary Reed
1421 Prince Street, Suite 200
Alexandria, VA 22314

FAX: (703) 684-9224
Phone: (703) 684-9222 or
Toll-free: (866) 684-9222
Email: mreed@mclaughlinryder.com