

**AUTHORIZATION LETTER FOR
STOCK DONATIONS**

For all gifts of stocks.....

A letter of authorization from the donor to the parish and to the Diocesan Finance Office is required. In your letter, please state the name and number of shares of stock you wish to give, the name of the parish you wish to receive credit and purpose of donation; i.e. parish donation, offertory donation building fund donation or Bishop's Annual Appeal or other. Provide your full name, address, and phone number. Please include the name of your brokerage firm. This will help us complete your transaction fully.

Date _____

**The Diocese of Columbus
Diocesan Finance Office
198 E. Broad Street
Columbus, Ohio 43215**

RE: 362-067749 Regular Diocesan Account

Dear Bishop Campbell,

Please accept this letter as your authorization to receive _____ shares of _____ stock into account 362-067749 at Morgan Stanley in the name of The Bishop of the Roman Catholic Diocese of Columbus, A corporation Sole, FBO Diocese of Columbus for the purpose of _____ (example: BAA, parish donation, offertory, building campaign, etc.).

Please credit my gift to _____ parish. This transfer is being made without valuable consideration and I hereby agree to hold you harmless in this matter.

Sincerely,

Donor Signature

Joint Donor Signature

Donor Address

Donor Phone Number

**Please send a copy of this authorization to: The Diocese of Columbus
Finance Office Attn: Beth Sisson
198 E. Broad Street
Columbus, Ohio 43215**

TRANSFER INSTRUCTIONS FOR STOCK DONATIONS

Thank you for considering a stock donation to the Diocese of Columbus.

If a donor physically has the stock certificate (s):

- A. The stock certificate(s), an executed stock power, and a letter of authorization (see attached) may be delivered/sent certified to the Diocesan Finance Office at:

**The Diocese of Columbus
Finance Office
198 East Broad Street
Columbus, Ohio 43215
(614) 224-1221**

OR

- B. You may send by registered mail, your unsigned stock certificate(s), an executed stock power and a letter of authorization (sample enclosed) to the Diocesan Finance Office, at the address indicated above.

OR

- C. You can deliver your stock certificate, an executed stock power, AND LETTER OF AUTHORIZATION to your Parish Office, **who in turn will forward to the Finance Office.**

If the stock certificate(s) or shares are held by a brokerage firm or financial institution, this information will be needed.

1. The broker for the Diocese of Columbus is:
**Morgan Stanley
Frank Bettendorf
41 S. High Street, Suite 2700
Columbus, Ohio 43215 (614) 229-4983**
2. The "DTC" number for Morgan Stanley is **0015**.
3. The official name of the Diocesan Account at Morgan Stanley is:
**The Bishop of the Roman Catholic Diocese of Columbus
FBO Diocese of Columbus**
4. The Diocesan Account Number is **362-067749**
5. Please ask your broker to note on the transfer how the stock is to benefit the Diocese. (Example: Parish Name, Bishop's Annual Appeal, etc.)

NOTE: You will need to supply a letter of authorization to the Diocese Finance Office (enclosed) so that information can be received concerning the stock gift into the diocesan account and to make sure you are credited with your stock gift.

Make sure your full name, address and parish name appear on the letter of authorization. Please call 224-1221 should you have any further questions. Thank you.