

## Gifts of Stock

- **To expedite processing of the stock donation and disbursement of funds, it is critical that the donor indicates the Parish or School beneficiary and the intention of the gift.**
- A letter of authorization from the donor to the parish is required.
- Fax the “Stock Donation Instructions” letter to Jim Buckley at 415-364-4509 and Grace Lee at 415-614-5514. A sample letter is on the following page.
- If you have questions, you can call Jim at 415-296-5839, or his assistant Shannon Tan at 415-249-5578. You may also email either of them ([jbuckley@firstrepublic.com](mailto:jbuckley@firstrepublic.com) or [stan@firstrepublic.com](mailto:stan@firstrepublic.com)).

### **Two ways that gifts of stock can be made:**

1. Transfers from a donor account at a brokerage house (the donor’s Broker must initiate the transfer).
  - In addition to the letter on the following page, please give the following information to the donor broker for transfer to the Archdiocesan broker (broker to broker).

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](mailto:jbuckley@firstrepublic.com)

- First Republic Securities Co., LLC - DTC #0443
- S.F. Archdiocese Account number is: 33L-070589
- Account Name: Archdiocese of San Francisco
- 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)

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

### 2. Stock Certificates donated directly by Donor

- Instruct the donor to deliver the stock certificate and an executed stock power to your Parish Office

**OR**

- The donor 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.

**SAMPLE LETTER FOR STOCK DONATION INSTRUCTIONS**

Date: \_\_\_\_\_

Mr. James 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*) \_\_\_\_\_

(*indicate program or campaign*) \_\_\_\_\_ .

Sincerely,

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Joint Customer Signature

Phone Number: \_\_\_\_\_

***Fax copy to Grace Lee at (415) 614-5514 or email at [leeg@sfarch.org](mailto:leeg@sfarch.org)***