



Authorization for Transfer of Gift Securities

Section I

Name of security(s) or mutual fund(s) _____

Number of shares _____

For the benefit of: (Specific diocesan ministry, parish, school or endowment)

Please list one entity per line; if more than four entities are requested, please complete and submit an additional form.

Entity	Percent split
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

Gifts to the Diocese of Wichita will be presumed to be for general purposes unless otherwise indicated above.

Section II

Wire transfer from donor's brokerage firm:

Broker/contact name and phone _____

Name(s) on account _____

Wire to the Catholic Diocese of Wichita at Morgan Stanley Smith Barney. Account: 307-217085-221

DTC: 0015

If you have questions regarding this transfer, please contact Zach Thomas at 913-402-5247.

Section III

Signature

Signature

Date

Date

Print name

Print name

Donor address: _____

City/State/Zip: _____ Donor phone _____

Email address: _____

This gift letter needs to be signed by the donor exactly as the name or names appear on the account the stock is being transferred from. All account owners must sign.

Please email or fax a copy of this form to:

Catholic Diocese of Wichita
424 N. Broadway
Wichita, KS 67202
development@CatholicDioceseOfWichita.org
Fax: 316-269-3902

Securities will not be sold and proceeds distributed until this form has been received.

Donor Instructions (Stock Gifts)

Donations of securities are easily accomplished. There are several important steps to make this process easy for both you, your broker and eventually the ministry/organization that will benefit from your gift.

1. All gifts are processed through the Wichita Diocese brokerage account at Morgan Stanley Graystone Consulting Group.
2. If you wish to have your broker make a transfer of shares as a charitable gift, you will need to complete the AUTHORIZATION FOR TRANSFER OF GIFT SECURITIES which can be found at Catholicdioceseofwichita.org/donate/. Most firms have their own form for gifting, so please contact your broker to verify what requirements they have for processing your gift of securities electronically.
3. Please give the original AUTHORIZATION FOR TRANSFER OF GIFT SECURITIES form to your broker with a copy to the Catholic Diocese of Wichita. You should also send any form your broker may require. You may **email the diocesan form** to development@catholicdioceseofwichita.org, **fax** to 316-269-3902, or **mail** to 424 N. Broadway, Wichita, KS 67202. We will coordinate with our broker to process your gift promptly and remit funds as you specify in Section I of the AUTHORIZATION FOR TRANSFER OF GIFT SECURITIES
4. Upon receipt of the security in the diocesan brokerage account at Morgan Stanley, and the receipt of the signed AUTHORIZATION FOR TRANSFER OF GIFT SECURITIES form the Diocese will execute an order to sell. Once the proceeds of the sale are received at the diocese from Morgan Stanley, you will be notified of this transaction by letter from the Office of Development and Planned Giving. The ministry/organization that is benefiting from your gift will also be notified at the same time. Please allow between 10 to 12 business days for this communication from the time your gift is received in the diocesan account. The only exception is for the timing of receipt on mutual fund shares. Mutual Fund typically take two to six weeks from the time the transfer is initiated. Mutual fund shares that are from smaller firms or are proprietary take the longest and usually arrive in three to five weeks, but can take up to that full six week estimate.