

**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. Jeffrey Rostand  
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. Rostand:

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. Jeffrey Rostand, 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.      FAX: (703) 684-9224  
Attention: Ms. Mary Reed      Phone: (703) 684-9222 or  
1421 Prince Street, Suite 200      Toll-free: (866) 684-9222  
Alexandria, VA 22314      Email: mreed@mclaughlinryder.com