

(Please identify recipient of gift below\*):

***Bishop’s Lenten Appeal (BLA), a Parish, or School***

Please use this form to alert us that you are initiating a transfer of stock/mutual fund to our account.

You will also need to send a separate letter/instruction to your broker, detailing donation of stock/mutual fund.

Investments (stocks, mutual funds, etc.) are sold as soon as possible, after manually confirming receipt and placing sell order.

Investment sales are usually executed within 2 business days and are subject to market volatility prior to the sale.

Fees are charged by our brokerage firm for their services. No fee is charged by the diocese.

Proceeds, net of fees, are sent to the beneficiary following liquidation. This may take up to 2 weeks.

Tax value of donation is based on mean value as measured on the day the investment is received into our account.

Mr. Timothy R. Cotnoir, Chief Financial Officer  
c/o Ms. Chris Farmer  
Catholic 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. Cotnoir:

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: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

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

**Catholic Diocese of Arlington (BLA, Parishes, Schools, etc.), A/C# PQ1-601349, DTC #0443 Pershing, LLC**

***\*I wish the proceeds of this gift to benefit: \_\_\_\_\_***  
***Please list beneficiary (BLA, or the parish, school, or a diocesan program)***

(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/email listed below) and***
- ***Mr. Timothy R. Cotnoir, Chief Finance Officer (address/FAX/email listed above)***

***When the desired beneficiary is a specific parish or school, please also advise them of the forthcoming gift.***

**For Communication to the Catholic 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 (866) 684-9222  
Email: mreed@mclaughlinryder.com