

DONATING STOCK TO THE
“Building Community”
CAPITAL CAMPAIGN

After you have checked with your tax advisor to be sure that this scenario applies to you, here's how you donate stock to St. Gregory the Great. It should take you two phone calls and about 30 minutes of your time.

Step 1:

Contact your stockbroker and tell them that you want to make a stock donation to St. Gregory the Great Catholic Church. They will need for you to provide the following information:

Catholic Diocese of San Diego

Acct # 6734218412392

DTC # 0418

Smith Barney Contact Person: Mandy Carr at (858) 597-7756

St. Gregory the Great Catholic Church is considered an entity of the Roman Catholic Bishop of San Diego, a corporation sole. It is for this reason that the stock must be transferred to the Roman Catholic Bishop of San Diego. Your broker will have to perform the transaction and make the diocese aware of such transaction. When this is completed, the parish will receive the full proceeds of your donation. The diocese does not charge the parish a fee or percentage for assisting with the transaction.

The Diocese of San Diego will provide you with a letter confirming that the shares have been transferred and the price at the time of transfer (for your tax records).

Step 2:

Since this account is for the diocese and not St. Gregory the Great in particular, you will need to inform the diocese that the donation is for the benefit of the St. Gregory the Great Building Fund in Scripps Ranch. You may keep both the diocese and the parish informed of your transaction by faxing or mailing the Stock Transfer form on the reverse of this page to both parties. You do not have to wait for your broker's confirmation letter before proceeding with this step. The diocese cannot do anything until the donor has made the gift and the stock is the diocese's possession to sell.

If you would like assistance, please contact our Campaign Office at (858) 653-3540 or the Diocesan Office of Stewardship & Development at (858) 490-8227.

Step 3:

Complete your pledge card and return it to the Campaign Office. We thank you in advance for your generosity.

STOCK TRANSFER
ST. GREGORY THE GREAT CATHOLIC CHURCH
“Building Community”
CAPITAL CAMPAIGN

Instructions for the transfer of stock or bond to the St. Gregory the Great Catholic Church, an entity of the Roman Catholic Bishop of San Diego, a Corporation Sole. Please return this information to St. Gregory the Great Campaign Office by mailing it to the parish or faxing it to (858) 653-3550.

TO:

Donor's Broker: _____

Broker's Telephone: _____

Broker's Fax: _____

FROM:

Donor's Name: _____

Donor's Address: _____

Donor's Telephone: _____

Donor's Fax: _____

Name of Security: _____

Number of Shares: _____

Donor's Signature: _____ Date: _____

IMPORTANT

Please send a copy of this sheet by mail or fax to the following:

St. Gregory the Great Catholic Church
c/o Campaign Office
11451 Blue Cypress Drive
San Diego, CA 92131
Phone: (858) 653-3540
Fax: (858) 653-3550

Diocese of San Diego
Office of Stewardship & Development
P.O. Box 85728, San Diego, CA 92186
Phone: (858) 490-8227
Fax: (858) 490-8272