



# BISHOP CHATARD HIGH SCHOOL

## Instructions for donating Stock and Mutual funds to Bishop Chatard High School

Thank you for your support of Bishop Chatard High School. A single brokerage account through the Archdiocese of Indianapolis helps us to streamline the process, keep gift processing expenses low, and ensure an IRS-approved acknowledgment. To process your contribution in a timely and efficient manner, please follow the outlined process for publicly traded securities such as stock and mutual funds and cash through your brokerage account.

**If you have any questions, please contact the Development Office at Bishop Chatard High School at [mruffing@bishopchatard.org](mailto:mruffing@bishopchatard.org), or 317-251-1451 x 2242**

### STEP 1: INITIATE THE TRANSFER WITH YOUR BROKER

It is important you contact your financial institution to request their required procedures and forms and provide them with the delivery instructions found below. **Please ask that they include your name** on all deliveries.

Deliver all DTC Eligible Securities to:

Morgan Stanley Smith Barney LLC

**DTC Number:** #0015

**Account Name:** Roman Catholic Archdiocese of Indianapolis

**Account Number:** 337-136954

*Note: Some financial institutions and mutual fund companies require the use of their own form or an additional letter of instruction. If you are transferring mutual funds, please check with your broker to see if the funds are transferable. If they are not transferable, please contact Caryn Wilkinson at Morgan Stanley, at 317-818-7388 for further assistance.*

### STEP 2: NOTIFY the Archdiocese of Indianapolis of your Transfer

There are two ways to notify us of this information – the attached form or by using a secure online form at [www.archindy.org/CCF](http://www.archindy.org/CCF). If using the online form, the attachment can be disregarded.

Including your name, stock name, number of shares, dates they will be transferred, and where to apply the donation (annual fund, capital campaign, towards a pledge, etc.).

Mail the completed form, making the Archdiocese of Indianapolis aware of your gift, and designation instructions can be sent as follows:

Mail

Roman Catholic Archdiocese of Indianapolis  
ATTN: Office of Stewardship and Development  
1400 N Meridian Street  
Indianapolis IN 46202

Email

[ccf@archindy.org](mailto:ccf@archindy.org)

*Please note email transmissions are not secure*

*Note: If the Archdiocese does not receive proper notification of a gift, it will be placed into a general fund at the Roman Catholic Archdiocese until identified.*

### STEP 3: CONFIRM YOUR TRANSFER

Transfers must be initiated by your financial advisor or broker. Please confirm with your broker or advisor that your gift has been transferred from your account to the archdiocese account and that the archdiocese has been informed. Once received, it usually takes 5-7 business days for your transfer to be liquidated, settled, and posted. It is at this time that the archdiocese will move the funds designated to Bishop Chatard, make Bishop Chatard aware of the transfer, and process a tax acknowledgment for your gift.

## LETTER OF AUTHORIZATION

Please accept this letter as my authorization to irrevocably designate the funds/property received by the Roman Catholic Archdiocese of Indianapolis as stated below.

### Donor contact information

Donor Name(s): \_\_\_\_\_ Phone number(s): \_\_\_\_\_

Donor Address: \_\_\_\_\_

Donor Email Address: \_\_\_\_\_

### Purpose of the Funds

The funds/property are for the benefit of the following ministry. Please provide additional sheets as needed.

- ☐ My gift is to a school or agency – School/Agency Name \_\_\_\_\_ **BISHOP CHATARD HIGH SCHOOL** \_\_\_\_\_
- ☐ General Contribution (unrestricted)
- ☐ Restricted School/Agency Contribution – please provide further detail: \_\_\_\_\_
- ☐ Other \_\_\_\_\_

### Broker/Fund Details

Delivering Broker/Institution Name: \_\_\_\_\_ Phone number: \_\_\_\_\_

Contact person within brokerage firm: \_\_\_\_\_

Anticipated Date of Transfer: \_\_\_\_\_

Name of Security	Symbol	Number of Shares	Approx. Value

*Please initiate the transfer based on the number of shares and not the dollar value since security values may fluctuate.*

## SIGNATURES

This is my/our written authorization to irrevocably transfer ownership of the assets specified in this form to the Roman Catholic Archdiocese of Indianapolis. I understand that any contribution, once accepted, represents an irrevocable contribution to the Roman Catholic Archdiocese of Indianapolis and is not refundable to me for any reason.

\_\_\_\_\_  
Donor Full Name (Please Print)

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date