



OUR
SHEPHERDS
OUR **FUTURE**
CAPITAL CAMPAIGN

GIFTS OF STOCK

Thank you for your generous gift of stock. The instructions below have been published by the *Our Shepherds – Our Future* Campaign Finance Office to complete your transaction in the most timely and efficient manner.

1. Please provide the below information to your broker or financial advisor:

Donor name: _____

Your parish name, city: _____

Broker Name: Raymond James
Broker Contact: Kelli Pearson, (616) 974-3379
Account name: Our Shepherds – Our Future, Inc.
DTC #: 0725
Account number: 2578V874

2. Please ask your broker to provide the confirmation number and information about the transfer (# of shares, company name, name of client) to the Campaign Finance Office:

Contact Name: Kevin Simon, comptroller
Phone Number: (616) 475-1253
Email Address: ksimon@grdiocese.org

3. The donor will receive a letter for tax purposes upon receipt of the securities. Please retain for your records.

Please note: To be recorded as a current calendar year donation, the securities must be received by the diocese by December 31st. A gift transferred by the donor's broker before December 31st but received in January will not qualify as a current calendar year donation. On occasion, transfers are not completed within the same day due to unforeseen circumstances, particularly at year's end.