

# MEMO

**DIOCESE OF SACRAMENTO**  
**The Catholic Foundation**  
2110 Broadway, Sacramento, CA 95818  
916-733-0266/FAX 916-733-0224

DATE: January 8, 2018

TO: Pastors, Parochial Administrators, Parochial Vicars and Parish Secretaries

FROM: Chantal LeFevre, Associate Director

SUBJECT: **Stock Transfer Procedures and Forms**

The Catholic Foundation of the Diocese of Sacramento maintains a clearing account through which stock donations to various diocesan ministries can be accomplished electronically. The following letter(s) may be used to direct a donor's broker in this regard.

**Contact Information:**

Katie Kelly  
Merrill Lynch  
1435 River Park Dr., #100  
Sacramento, CA 95815  
Phone: (916) 648-6333  
Toll Free: (800) 937-0791  
Fax: (916) 265-0090

**Stock Verification Process:**

The Catholic Foundation will receive a stock confirmation from Merrill Lynch verifying the value of the shares of stock, the price at sale, and final value of the gift for tax reporting purposes.

Upon receipt of the donation, The Catholic Foundation will provide the donor(s) with the appropriate IRS form to evidence the value of the stock donation, and will arrange for the proceeds to be distributed in accordance with the donor's/donors' expressed intent. The Catholic Foundation will notify the donor's/donors' Parish, school, organization or endowment about his/her/their gift.