

HOW TO HANDLE GIFTS OF STOCK

When someone wishes to give a gift of stock please refer him or her to **Amanda Pierce at PNC in Cleveland, Ohio**. Amanda will provide instructions for the transfer. Amanda's direct dial phone number is 216-222-8657. Her toll-free number is 1-877-622-5479, extension 28657 and her e-mail is amanda.pierce@pnc.com.

PNC/Amanda will need to know:

The stock is a gift to be processed through the **Roman Catholic Diocese of Lexington, Kentucky** account

The check for the net proceeds is issued to the **Catholic Diocese of Lexington, Attention Debbie Swisher, Controller**.

The name of the donor and the broker

The name of the stock and the number of shares

Who or what the donation is for (Example: Annual Appeal, One in Faith and Mission, Parish, etc.)

NOTE: After you have contacted **PNC** or when you know a donor is contacting **PNC**, please contact Debbie Swisher at the Catholic Center. (859-253-1993 Ext. 267 or dswisher@cdlex.org) Let her know to expect the stock, the type of stock and number of shares and the location that should receive the gift.

A check will be issued from the Diocese to the appropriate entity the first Friday after the proceeds are received from **PNC**. The Diocese will also forward the donor gift amount (the value of the stock on the date it was received) to the entity for the individual's tax purposes.

If the stock to be gifted is held electronically, please instruct your broker or the custodian of the shares to deliver the gift to:

Depository Trust Company

PNC Bank DTC Participant #2316

For credit to: Roman Catholic Diocese of Lexington, Kentucky

Custody account # 4039K012003