

THE ROMAN CATHOLIC
ARCHDIOCESE OF ATLANTA



**INSTRUCTIONS
FOR MAKING A CHARITABLE GIFT OF SECURITIES**

For electronic transfer via broker or bank:

You or your broker or banker should send a letter/email to the following individual at the Archdiocese aware of the impending transfer:

Attn: Mary Ann Brown
Archdiocese of Atlanta
2401 Lake Park Drive, SE
Smyrna, Ga. 30080-8862

Mary Ann Brown: mbrown@archatl.com, 404-920-7407

The correspondence to the Archdiocese should include the following information:

1. Your name
2. Your parish
3. Name of the security being transferred
4. number of shares
5. Name of the financial institution handling your transaction
6. The intended beneficiary of your gift (e.g., your parish, Archbishop's Annual Appeal, Catholic Charities, etc.)

You or your broker or banker should also contact Truist Bank to notify them of the pending transfer and the intended beneficiary of the gift:

- Beverly Glenn, Truist Bank, Gift Administrator, 404-724-3556
TruistBankGiftClearing@Truist.com
- Louise Gorman, Truist Bank, Gift Administrator (Alternate), 404-724-3344
TruistBankGiftClearing@Truist.com

The tax identification number for the Archdiocese is: 83-3544215

For hand delivery of your gift of securities:

Do not sign your actual certificate(s) until you arrive at the Catholic Center.

The Catholic Center is located at 2401 Lake Park Drive, SE, Smyrna, Ga. 30080-8862. Please contact Mary Ann Brown of the Finance Office before you come to alert her when to expect you. You may contact Ms. Brown at 404-920-7407 or mbrown@archatl.com.

At the Catholic Center's reception desk, ask for Mary Ann Brown who will receive your gift of securities. Make sure you inform Ms. Brown where you want to your gift to be allocated. Sign and date your certificates at the Catholic Center in the presence of Ms. Brown. You will receive

a receipt for the delivery of the shares (name of owner listed on the shares; number of shares; and the name and class of stock).

You will receive an acknowledgment letter for the gift within 30 days, detailing the receipt of the number of shares, the stock issuer, the date of the gift, and the [tax-deductible] gift value of your stock, i.e., the median value of your stock on the date of transfer.

For the transfer of actual certificates by mail:

Call the Archdiocese of Atlanta first, 404-920-7407, and ask to speak with Mary Ann Brown, to make her aware of your intentions. Please tell her what you want your gift to be allocated. [Do not sign the actual stock certificates.](#) Mail the actual certificates, by registered mail or express delivery, requesting a signature as proof of delivery. Mail to:

Attn: Mary Ann Brown
Archdiocese of Atlanta
2401 Lake Park Drive, SE
Smyrna, Ga. 30080-8862

In a separate envelope, also by registered mail or express delivery, mail a signed stock power of authority, to transfer ownership of the stock to the Archdiocese.

You will receive an acknowledgment letter/receipt within 30 days, detailing the receipt of the number of shares, the stock issuer, and the date of the gift (for tax purposes).

Continued on next page

	<h2 style="text-align: center;">Gift Clearing Delivery Instructions</h2>																		
TYPE OF GIFT	INSTRUCTIONS																		
DTC Eligible Securities (Stocks, Bonds, ETFs)	Participant #2039 FFC Truist Bank Account Number: 1114530 Account Name: Archdiocese Gift Clearing																		
Fed Securities	FED: ABA #042000013 US Bank NA/1050 Account 001050985490 FFC Truist Bank Account Number: 1114530 Account Name: Archdiocese Gift Clearing																		
Global Securities	Contact TruistBankGiftClearing@Truist.com for global delivery instructions.																		
Mutual Funds	Contact TruistBankGiftClearing@Truist.com for Mutual Fund delivery instructions.																		
Physical Securities	Truist Bank Free Movement, Mail Code 803-05-15-10 303 Peachtree Street, N.E. 15 th Floor, Suite 1520 Atlanta, GA 30308 *Reference Account Number: 1114530 & Account Name: Archdiocese Gift Clearing on the documentation accompanying the stock certificate(s)																		
Cash Wire and Check Instructions	Contact a member of your Client Service Team for instructions																		
Wiring Instructions for gifts within US	<table border="0" style="width: 100%;"> <tr> <td style="width: 60%;">Bank Name.....</td> <td>Truist</td> </tr> <tr> <td></td> <td>Institutional Advisory Services</td> </tr> <tr> <td></td> <td>303 Peachtree Street, 15th Floor</td> </tr> <tr> <td></td> <td>Atlanta, GA 30303</td> </tr> <tr> <td>ABA Routing/Transit Number.....</td> <td>061000104</td> </tr> <tr> <td>GL Account Number.....</td> <td>9088000038</td> </tr> <tr> <td>GL Account Name.....</td> <td>Institutional Advisory Services (IAS)</td> </tr> <tr> <td>FFC Trust Account Name.....</td> <td>Archdiocese Gift Clearing</td> </tr> <tr> <td>FFC Trust Account Number.....</td> <td>1114530</td> </tr> </table>	Bank Name.....	Truist		Institutional Advisory Services		303 Peachtree Street, 15 th Floor		Atlanta, GA 30303	ABA Routing/Transit Number.....	061000104	GL Account Number.....	9088000038	GL Account Name.....	Institutional Advisory Services (IAS)	FFC Trust Account Name.....	Archdiocese Gift Clearing	FFC Trust Account Number.....	1114530
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Contact	Phone number
Beverly Glenn (Gift Administrator) TruistBankGiftClearing@Truist.com	404-724-3556
Louise Gorman (Gift Administrator - Alternate) TruistBankGiftClearing@Truist.com	404-724-3344