

DIOCESE OF METUCHEN
Guide for Processing Gifts of Stock / Securities

Thank you for interest in sharing a portion of your God-given resources for the spiritual betterment of the Kingdom already present in our midst. Know that your stewardship is deeply appreciated as we, in turn, become stewards of your generosity.

The following procedures apply to electronic transfers for charitable gifts of stock to the Diocese of Metuchen.

1. Submit your stock transfer request in writing to your broker.
2. Share the following instructions for electronic (DTC) transfer with your broker.
3. Please communicate to the Diocesan Finance Office the stock name, number of shares, and the date you requested that the transfer is to be made.

Contacts: Catherine Solfaro, Controller, Office of Finance
732-562-2421, or csolfaro@diometuchen.org

Thomas J. Smith, Director of Stewardship & Development
732-562-2438, or tjsmith@diometuchen.org

Please specify your preference, if any, of how the Diocese should use your gift (i.e. Bishop's Annual Appeal, Tuition Angel, a parish, a school, a planned gift, or any particular program or ministry of interest).

ELECTRONIC SECURITIES TRANSFER PROCEDURES

The Diocese's account for DTC transfers is held by:

Merrill Lynch
194 Wood Ave South
Iselin, NJ 08837
732-632-5800

Account Officer: Mr. Joe Gough
732-632-5806
Asst. Acct. Officer: Sue Thalheimer
732-632-5808
Fax# 732-475-4919

Account Name: Diocese of Metuchen

Account Number: 747-04A57 **DTC-8862** (effective June 5, 2017)

Diocese of Metuchen Tax ID# 22-2385423

For donors holding stock certificates they wish to gift to the Diocese, the donor will need to transfer ownership of the stock or bond to the Diocese of Metuchen by completing two forms: 1) Irrevocable Stock or Bond Power and 2) Stock Donation Form. These forms may be obtained from the Office of Stewardship & Development by calling 732-562-2432.

For gift of mutual fund shares, please contact your mutual fund company for instructions on how shares may be issued in the name of The Diocese of Metuchen.