

Stock Transfer Instructions for Charitable Gifts to the Foundation for the Diocese of Helena

1. *Before the transfer of stock is made, please notify the Foundation of the name and number of shares to be donated, along with your broker's name and brokerage firm.*

Foundation for the Diocese of Helena, Inc.

Contact: Jeanne Saarinen, Executive Director

PO Box 1729 * 515 North Ewing

Helena, MT 59624

jsaarinen@diocesehelena.org

(406) 442-5820 – Helena area

(800) 584-8914 – Toll free in Montana

(406) 442-5191 - Fax

2. *Provide the following information to your broker to transfer donated stock directly to the Foundation's investment account.*

Wells Fargo Wealth Management

PO Box 597, Helena MT 59624

Foundation Account #: 82695800

DTC Clearing #: 2027

Bank ID #: 94866

David W. Ashby, dave.w.ashby@wellsfargo.com, (406) 447-2056, (406) 447-2069 (fax)

Les Coleman (Dave's assistant), leslee.s.coleman@wellsfargo.com, (406) 447-2093

3. *Provide a written statement to the Foundation explaining the purpose for which the gift of stock is to be used. For your convenience, you may use the form that accompanies these instructions, or you may simply send us a letter.*

We will send you an acknowledgement after your stock gift is received. For IRS tax return purposes, the date of the gift is the date that shares are received in the Foundation's account. The gift value is the average of the high and low price on that date. The Foundation for the Diocese of Helena is a 501(c)(3) Montana nonprofit corporation, and our Tax ID # is 81-0449307.

For gifts of mutual funds, please contact us first, because procedures may vary slightly with each mutual fund company. Please allow 4-6 weeks for this process, especially if you wish to contribute mutual funds by December 31st of a calendar year, for tax purposes.

Thank You Very Much for Your Support!



Notification of Stock Gift to the Foundation for the Diocese of Helena

Upon transfer of the gifted stock, please complete and send (fax, email, regular mail) the following information to the Foundation:

Donor Name(s): _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

Number of Shares: _____ Name of Stock: _____

Date Transferred: _____

Your Brokerage Handling Stock Transfer: _____

Purpose of Gift: _____

SIGNATURE

DATE

Please return to:

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Questions?

Contact Jeanne Saarinen, Foundation Executive Director, at (406) 442-5820, ext. 36 (*in the Helena area*), (800) 584-8914, ext. 36 (*toll-free in Montana*), or email at

jsaarinen@diocesehelena.org. *Thank you!*