

St. Catherine of Siena

Securities' Gifting Procedures

If you would like to make a gift of appreciated securities to the Church, please follow these steps:

1. Inform the Business Manager, Joe Abatemarco, of your intention to donate stock. Please let him know the name of the stock and the number of shares to be donated. Also, let him know how you want the proceeds from the sale of the stock to be used. This is the **only** sure way to know who transferred stock to our account and how it should be used.

Joe works in the Business Office located in Room 205 of the O'Connor Center and can be reached at 203-637-3661, ext. 325 or at finance.director@stcath.org.

2. Call or write a letter to your broker requesting that stock be transferred to the account of St. Catherine of Siena Church. Tell your broker that the **DTC number is 0221**, UBS Financial Services, Inc. for the benefit of St. Catherine of Siena Church, **Account TN02018-EZ**.

Our contact at UBS is Ben Quick. Ben works at UBS Financial, One Lafayette Place, Greenwich, CT 06830. He can be reached at 203-862-2126. An alternative contact is Frank Powers. Frank can be reached at 203-862-2146.

3. Ask your broker to notify you of the details of the transaction especially the date of the transfer and the average value of the stock on that date. You will need this information for tax purposes.
4. Once the stock has been sold, you will receive a letter from the Parish with the details of the transaction. Your account will be credited with the full value of the stock as of the sale date. The Parish pays the brokerage fees.

We sincerely thank you for your kindness.

UBS Financial Services, Inc.
St. Catherine of Siena Church
Account # TN 02018 EZ
Universal ID 7503452008M
DTC # 0221