

**Most Holy Trinity Parish**  
Capital Campaign  
*Building the Kingdom, Building the Parish, Building our Home*

**Stock Transfer Procedure**

**A. Electronic Transfer**

1. Contact the Most Holy Trinity Parish Office at 570.595.3100. Information required – donor’s name, phone number, name of brokerage firm and contact person, type of securities and number of shares being transferred.
2. Complete a Campaign Contribution Form and forward it to the Campaign Office.
3. Forward the following account information to your broker:
  - a. Account is with RBC Capital Markets LLC  
(serving brokers Buckman, Buckman, Reid Inc. [BBR])
  - b. Name of Account: Most Holy Trinity Parish
  - c. Designate transfer for Most Holy Trinity Parish, Cresco, PA
  - d. Account No. 876-08539
  - e. DTC No. 0235
4. The values of the shares will be based on the closing price of the security on the day the shares are received. Shares will be sold and proceeds deposited in the Most Holy Trinity Capital Campaign Fund.

**B. Transfer of Physical Certificates**

1. Contact the Most Holy Trinity Parish Office at 570.595.3100 to arrange delivery of the certificates (to the Campaign Office).
2. Complete a Campaign Contribution Form and forward it to the Campaign Office.
3. Signed certificates and a letter of intent will be forwarded to BBR. The value of the shares will be based on the closing price of the security on the day the shares are received, with proceeds deposited in the Most Holy Trinity Capital Campaign Fund.

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Capital Campaign**

*Sample letter of authorization for DTC transfer*

Thank you for choosing to support our capital campaign as we seek to build the kingdom, build the parish, and build our home. As you prepare to authorize a DTC transfer, we kindly ask that you notify the parish office of your transfer as donor information is **not** included in the information the parish receives after your stock has been transferred to our account. We **cannot** credit you properly unless you notify us of your transfer. **Please include the stock name and number of shares in your notification.** Notification can be sent via email to [mht-cc@outlook.com](mailto:mht-cc@outlook.com).

Please note that some firms will require this type of letter to be notarized. Check with your advisor for details.

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Date

Name of Agent

Name of Firm

Address

City, State Zip

Dear Sir or Madam:

I/We wish to make a gift valued at approximately \$\_\_\_\_ dollars from my/our account number \_\_\_\_\_ to Most Holy Trinity Parish. The securities and number of shares I/we wish to transfer are:

*(Name of securities and numbers of shares)*

Please transfer the securities via the DTC system to Most Holy Trinity Parish's account at RBC:

**DTC number 0235 for further credit to account number 876-08539.**

This transfer should/must be effectuated no later than \_\_\_\_\_ (date). Please notify me/us when the transfer is complete.

I/We understand that my/our gift will be valued, for IRS purposes, based on closing price on the gift date, which is established by the date when our stock "hits" the Most Holy Trinity Parish's account.

Thank you,  
*Signature(s)*

Cc: Development Office  
Most Holy Trinity Parish  
236 Route 390  
Cresco, PA 18326