



BISHOP CHATARD HIGH SCHOOL

Instructions for donating Stock and Mutual funds to Bishop Chatard High School

Thank you for your support of Bishop Chatard High School. A single brokerage account through the Archdiocese of Indianapolis helps us streamline the process, keep gift processing expenses low, and ensure an IRS-approved acknowledgment. To process your contribution in a timely and efficient manner, please follow the outlined process for publicly traded securities such as stock, mutual funds, and cash through your brokerage account.

STEP 1: INITIATE THE TRANSFER WITH YOUR BROKER

It is important you contact your financial institution to request their required procedures and forms and provide them with the delivery instructions found below. **Please ask them to include your name** on all deliveries.

Deliver all DTC Eligible Securities to:

Morgan Stanley Smith Barney LLC

DTC Number: #0015

Account Name: Roman Catholic Archdiocese of Indianapolis

Account Number: 337-136954

Note: Some financial institutions and mutual fund companies require their own form or an additional letter of instruction. If you are transferring mutual funds, please check with your broker to see if the funds are transferable. If they are not transferable, please contact Caryn Wilkinson at Morgan Stanley, at 317-818-7388 for further assistance.

STEP 2: NOTIFY the Archdiocese of Indianapolis (and Bishop Chatard) of your Transfer

There are two ways to notify the archdiocese of this information – the attached form or by using a secure online form at www.archindy.org/CCF. If using the online form, the attachment can be disregarded. Including your name, stock name, number of shares, dates they will be transferred, and where to apply the donation (annual fund, capital campaign, towards a pledge, etc.).

Mail the completed form, making the Archdiocese of Indianapolis aware of your gift, and designation instructions can be sent as follows:

Mail

Roman Catholic Archdiocese of Indianapolis
ATTN: Office of Stewardship and Development
1400 N Meridian Street
Indianapolis IN 46202

Email

ccf@archindy.org

Please note email transmissions are not secure

*Note: If the Archdiocese does not receive proper notification of a gift, it will be placed into a general fund at the Roman Catholic Archdiocese until identified. Please notify Margaret Ruffing at **Bishop Chatard High School** of your gift at mruffing@bishopchatard.org, 317-251-1451 x 2242. This helps expedite the process by connecting your stock gift through the Archdiocese to Bishop Chatard.*

STEP 3: CONFIRM YOUR TRANSFER

Transfers must be initiated by your financial advisor or broker. Please confirm with your broker or advisor that your gift has been transferred from your account to the archdiocese account and that the archdiocese has been informed. Once received, it usually takes 5-7 business days for your transfer to be liquidated, settled, and posted. It is at this time that the archdiocese will move the funds designated to Bishop Chatard, make Bishop Chatard aware of the transfer, and process a tax acknowledgment for your gift.

Should you need additional assistance or have questions concerning your gift, please contact us at ccf@archindy.org or call Amy Higgins at 317-236-1482.