



Guidelines for Gifts of Stock

to the Roman Catholic Diocese of Wheeling-Charleston

When gifting shares of stock to the Diocese of Wheeling-Charleston or the Catholic parish, school, or charity of your choice, please follow the procedures appropriate to your particular holdings.

If the shares you currently hold are in a brokerage account or other book entry registration:

- Instruct your broker to transfer the shares to **WesBanco Bank Wheeling, DTC #2271, f/b/o Account # 1035021395** Diocese of Wheeling-Charleston.
- Forward the attached **Instructions for Gifts of Stock** (attached) to the Finance Office at the Diocese of Wheeling-Charleston. This sheet describes your specific instructions on the use of this gift.

If the shares are registered in your name:

- Obtain a blank stock power from your local broker or bank and sign a separate stock power for each separate company.
- **DO NOT** sign the back of your certificate as it appears on the front. **DO NOT** fill in the Sell/ Assign / Transfer section.
- Bring the stock certificate to the Diocese of Wheeling-Charleston Finance Office. If you are mailing in your certificate, *please use certified mail only*. Along with the certificate, please also enclose your **Instructions for Gifts of Stock** (attached) which describes your specific instructions on the use of this gift.
- If available, sign and attach a Form W-9 verification of your social security number.

If the shares you currently hold are in a certificate form and you have had the certificate reregistered into "Roman Catholic Bishop of Wheeling-Charleston":

- Mail your certificate to the Diocese of Wheeling-Charleston Finance Office along with your **Instructions for Gifts of Stock** (attached) which describes your specific instructions on the use of this gift.

If you wish to specify a broker to handle your gift: If you have a specific broker that you would like to handle the liquidation trade, please indicate his/her name, firm, and telephone number on the **Instructions for Gifts of Stock** (attached).



Instructions for Gifts of Stock

to the Roman Catholic Diocese of Wheeling-Charleston

Date: _____

Donor Name: _____

Donor Address: _____

Donor City, State, Zip Code: _____

Daytime Telephone Number: _____

Email Address: _____

Social Security Number: _____

*Gift receipt will be mailed to name and address above, unless otherwise indicated.

Name of Stock/Security being donated: _____

Number of Shares being donated: _____

This donation is for the benefit of: _____
(parish, school, or charity name)

Broker to handle the liquidation trade, if desired:

Broker Name: _____ Firm: _____

Broker Phone Number: _____

Forward completed form to:

Diocese of Wheeling-Charleston
Finance Office
PO Box 230
Wheeling, WV 26003