

**Stock Transfer Instructions for Charitable Gifts to the
Roman Catholic Bishop of Helena,
a Montana Religious Corporation Sole**

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

Diocese of Helena

Contact: Glenda Seipp, Stewardship Services Director
PO Box 1729 * 630 N Last Chance Gulch, Ste 2200
Helena, MT 59624-1729
gseipp@diocesehelena.org
(406) 389-7062 – 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 Roman Catholic Bishop of Helena, a Montana Religious Corporation Sole - Diocese of Helena's investment account.

DA Davidson
Attn: Account Transfer Dept.
8 Third Street No.
Great Falls, MT 59401
Diocese of Helena Account #: 67033038 Roman Catholic Bishop of Helena, a Montana Religious Corporation Sole

For DTC Eligible Securities

Deliver to DTC Clearing #0361
Roman Catholic Bishop of Helena #67033038

For Mutual Funds call: Mike Holland 406-442-9600

For General Inquiries call: Mike Holland 406-442-9600

3. Provide a written statement to the Diocese of Helena – Stewardship Services 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 Diocese of Helena's account. The gift value is the average of the high and low price on that date. The Roman Catholic Bishop of Helena is a 501(c)(3) Montana nonprofit corporation and our Tax ID # is 81-0231797.



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!

Effective: January 1, 2022

Notification of Stock Gift to the Roman Catholic Bishop of Helena

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

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: "for the benefit of..." _____

SIGNATURE

DATE

Please return to:

Diocese of Helena

PO Box 1729 * 630 N Last Chance Gulch, Ste 2200

Helena, MT 59624-1729

gseipp@diocesehelena.org

(406) 442-5191 - Fax

Questions?

Contact Glenda Seipp, Stewardship Services Director, at (406) 389-7062 or email at

gseipp@diocesehelena.org.

Thank you!