

GIFTS OF SECURITIES

TFE maintains a Charitable Gift Account that is available to complete the sale of donated securities.

Once the securities are transferred into the account, TFE sells the securities and transmits the net proceeds electronically to the parish or organization designated by the donor. **There is no cost for the use of this account.** The donor receives an acknowledgement letter from TFE noting the market value of the donated securities for tax purposes.

Follow these steps to make a gift of securities.

Step 1: Email TFE's Executive Director, Jim Wenzler, at director@tfewis.org with the following information:

Security Name
Number of shares
Brokerage firm security transferred from
Approximate date of transfer
Benefitting parish or organization within the Diocese
Donor Name(s)

Important!

Donor names are critical to complete the process!

Step 2: Instruct your broker to electronically transfer the **STOCK** to TFE's account at **JP Morgan** using the following information:

JPMorgan Chase Bank, N.A.
DTC Participant Number 0902
Credit Account Number: P72500
FFC Account Number: 020534004
FFC Account of -

TRUSTEES OF FUNDS & ENDWMNTS INC - CHARITABLE GIFT ACCOUNT

Step 3: Notify your parish treasurer or the treasurer of the organization that will receive your gift to expect the funds.