



## 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: \_\_\_\_\_

\*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  
Stewardship & Development  
PO Box 230  
Wheeling, WV 26003  
or email to Krissie Benson at  
KBenson@dwc.org