

# GUIDE

## Gift Processing

# ALL for the SAKE of OTHERS

UNITED CATHOLIC APPEAL  
*Christ Our Hope*

Archdiocese of Indianapolis



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# Guide Overview

## Purpose of this Guide

The purpose of the Gift Processing Guide is to assist the parish staff and the Office of Stewardship and Development team in proactively reviewing and recording all intentions made to the United Catholic Appeal. By following this process, we can properly credit every donor's contribution. This will help foster a spirit of partnership among donors, parish staff members and the Office of Stewardship and Development for funding the work of the Church in central and southern Indiana.

## Gift Processing

To assist with gift processing, the Office of Stewardship and Development continues to partner with Wausau Solutions. Please make note of the mailing address for all gifts to the United Catholic Appeal:

**Wausau Solutions**  
**168 Lisbon Street**  
**Lewiston, ME 04240-7234**

Please send all non-gift communications to the 1400 N. Meridian Street, Indianapolis, IN 46202.

## Spanish Intention Envelopes

Bilingual intention envelopes are mailed to all households that are noted in the database as Spanish speaking. This information is made available to our office through the census data updates and the Household Changes Form.

## Office of Stewardship and Development Contact Information:

Jolinda Moore  
Executive Director of  
Stewardship & Development

(317) 236-1462  
(800) 382-9836, ext. 1462

Dana Stone  
Director of Appeals and  
Creative Services

(317) 236-1591  
(800) 382-9836, ext. 1591

Dana Townsend  
Director of Donor Services

(317) 236-1498  
(800) 382-9836, ext. 1498

Barb Clemons  
Data Entry Specialist

(317) 592-4062  
(800) 382-9836, ext. 4062

# UCA Intention Card: SPLIT

(Mailed to Households)

**2018-19 UNITED CATHOLIC APPEAL GIFT INTENTION CARD**

Last year, your support was: **\$0.00**  I have already made a 2018-19 UCA gift.

**TOTAL PLEDGE** **AMOUNT ENCLOSED**

Name \$   ,    .

Address Line 1 \$   ,    .

Address Line 2

City, State Zip

Phone

E-mail

My gift schedule beginning January 2019:


Monthly  Quarterly  Semi-Annually  Annual Contribution \_\_\_\_\_ (mo./yr)

Check enclosed, made payable to: United Catholic Appeal. Check No. \_\_\_\_\_

Charge \$ \_\_\_\_\_ to my:  Visa  MasterCard  Discover  AMEX Starting \_\_\_\_\_ (mo./yr)

Please use my contribution to support the ministry areas most in need. Account No. \_\_\_\_\_ Exp. Date \_\_\_\_\_

*To designate your gift to a specific ministry, please see reverse side.* Name as it appears on the card \_\_\_\_\_

Scanline 

**UNITED CATHOLIC APPEAL**  
*Christ Our Hope*

P.O. Box 6043  
Indianapolis, IN 46206-6043  
800-382-9836 Ext: 4062  
[www.archindy.org/UCA](http://www.archindy.org/UCA)

I want my gift to impact (please select one):

Fostering Catholic education and faith formation.

Education for our seminarians and deacons and retirement benefits for priests.

People in need through our local Catholic Charities agency.

Underserved students who attend the archdiocesan Notre Dame ACE Academies through need-based scholarships.

**Legacy Giving**

Yes, please send information about estate planning, or how to include the Church in my will or trust.

I already have included the Church in my will or trust.

**Giving Guide**

| Annual Earnings | 1% Pledge | 12 Gifts | 3% Pledge | 12 Gifts |
|-----------------|-----------|----------|-----------|----------|
| \$10,000        | \$100     | \$9      | \$300     | \$25     |
| \$20,000        | \$200     | \$17     | \$600     | \$50     |
| \$30,000        | \$300     | \$25     | \$900     | \$75     |
| \$50,000        | \$500     | \$42     | \$1,500   | \$125    |
| \$75,000        | \$750     | \$63     | \$2,250   | \$188    |
| \$100,000       | \$1,000   | \$84     | \$3,000   | \$250    |
| \$150,000       | \$1,500   | \$125    | \$4,500   | \$375    |
| \$200,000       | \$2,000   | \$167    | \$6,000   | \$500    |

THANK YOU!

Please note, the above card is for all parishes inside of Indianapolis. Parishes outside of Indianapolis will not have the option of restricting gifts to the Notre Dame ACE Academies.

# UCA Intention Card: IN-PEW PLEDGE CARD

(Mailed in bulk as part of the Parish Kit)

**2018-19 UNITED CATHOLIC APPEAL GIFT INTENTION CARD**

I have already made a 2018-19 UCA gift.

Full Name \_\_\_\_\_

Address/Apartment/Unit# \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Parish Name \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Please use my contribution to support the ministry areas most in need.  
To designate your gift to a specific ministry, please see reverse side.

TOTAL PLEDGE \$   ,    .

AMOUNT ENCLOSED \$   ,    .

My gift schedule beginning January 2019:

Monthly  Quarterly  Semi-Annually  Annual Contribution \_\_\_\_\_ (mo/yr)

Check enclosed, made payable to: United Catholic Appeal. Check No. \_\_\_\_\_

Charge \$ \_\_\_\_\_ to my:  Visa  MasterCard  Discover  AMEX Starting \_\_\_\_\_ (mo/yr)

Account No. \_\_\_\_\_ Exp. Date \_\_\_\_\_

Name as it appears on the card \_\_\_\_\_

**UNITED CATHOLIC APPEAL**  
*Christ Our Hope*

I want my gift to impact (please select one):

Fostering Catholic education and faith formation.

Education for our seminarians and deacons and retirement benefits for priests.

People in need through our local Catholic Charities agency.

Underserved students who attend the archdiocesan Notre Dame ACE Academies through need-based scholarships.

**Legacy Giving**

Yes, please send information about estate planning, or how to include the Church in my will or trust.

I already have included the Church in my will or trust.

P.O. Box 6043  
Indianapolis, IN 46206-6043  
800-382-9836 Ext: 4062  
www.archindy.org/UCA

**Giving Guide**

| Annual Earnings | 1% Pledge | 12 Gifts | 3% Pledge | 12 Gifts |
|-----------------|-----------|----------|-----------|----------|
| \$10,000        | \$100     | \$9      | \$300     | \$25     |
| \$20,000        | \$200     | \$17     | \$600     | \$50     |
| \$30,000        | \$300     | \$25     | \$900     | \$75     |
| \$50,000        | \$500     | \$42     | \$1,500   | \$125    |
| \$75,000        | \$750     | \$63     | \$2,250   | \$188    |
| \$100,000       | \$1,000   | \$84     | \$3,000   | \$250    |
| \$150,000       | \$1,500   | \$125    | \$4,500   | \$375    |
| \$200,000       | \$2,000   | \$167    | \$6,000   | \$500    |

**THANK YOU!**

Please note, the above card is for all parishes inside of Indianapolis. Parishes outside of Indianapolis will not have the option of restricting gifts to the Notre Dame ACE Academies.

# United Catholic Appeal Intention Cards: BILINGUAL

Spanish Intention Cards are now bilingual cards. Please process these cards the same as the English Intention Cards.

**2018-19 UNITED CATHOLIC APPEAL GIFT INTENTION CARD**

Full Name/ *Nombre Completo* \_\_\_\_\_

Address/Apartment/Unit #/ *Dirección/No. de Apartamento* \_\_\_\_\_

City, State, Zip/ *Ciudad, Estado, Código Postal* \_\_\_\_\_

Parish Name/ *Nombre de la Parroquia* \_\_\_\_\_

Phone/ *Teléfono* \_\_\_\_\_

Email/ *Correo Electrónico* \_\_\_\_\_

Please use my contribution to support the ministry areas most in need.  
To designate your gift to a specific ministry, please see reverse side.

TOTAL PLEDGE/ *Compromiso a donar la cantidad:*  
\$ [ ] [ ] , [ ] [ ] [ ] . [ ] [ ]

AMOUNT ENCLOSED/ *Donación adjunta:*  
\$ [ ] [ ] , [ ] [ ] [ ] . [ ] [ ]

I have already made a 2018-19 UCA gift.

My gift schedule beginning January 2019/ *Mi donación comienza a tomar efecto en 2019:*  
 Monthly  Quarterly  Semi-Annually  Annual Contribution \_\_\_\_\_  
*Mensualmente Cuatrimestralmente Semestralmente Anualmente (mo/yr)*

Check enclosed, made payable to: United Catholic Appeal. Check No. \_\_\_\_\_  
*Adjunto un cheque hecho a nombre de United Catholic Appeal.*

Charge \$ \_\_\_\_\_ to my:  Visa  MasterCard  Discover  AMEX Starting \_\_\_\_\_  
*Cargo a mi a mi Comenzando (mo/yr)*

Account No. \_\_\_\_\_ Exp. Date \_\_\_\_\_  
*Número de Cuenta Fecha de Expiración*

Name as it appears on the card \_\_\_\_\_  
*Nombre Como Aparece en la Tarjeta*

**UNITED CATHOLIC APPEAL**  
*Christ Our Hope*

I want my gift to impact (please select one):  
*Deseo que mi donación se asigne a (seleccione una por favor):*

Fostering Catholic education and faith formation.  
*Promover la formación de fe y educación Católica.*

Education for our seminarians and deacons and retirement benefits for priests.  
*Educación para los seminaristas y diaconos y beneficios de jubilación para sacerdotes.*

People in need through our local Catholic Charities agency.  
*Personas con necesidad a través de Caridades Católicas.*

Underserved students who attend the archdiocesan Notre Dame ACE Academies through need-based scholarships.  
*Estudiantes menos favorecidos que atienden las academias Arquidiocesanas ACE de Notre Dame a través de las becas basadas en la necesidad.*

**Legacy Giving/ Planeación de Donaciones**

Yes, please send information about estate planning, or how to include the Church in my will or trust.  
*Si, por favor envíeme información acerca de la planificación de sucesión de inmuebles o de como incluir a la Iglesia en mi testamento.*

I already have included the Church in my will or trust.  
*Ya he incluido la Iglesia en mi testamento.*

P.O. Box 6043  
 Indianapolis, IN 46206-6043  
 800-382-9836 Ext. 4062  
 www.archindy.org/UCA

**Giving Guide/ Guía Para Donaciones**

| Annual Earnings      | 1% Pledge             | 12 Gifts        | 3% Pledge             | 12 Gifts        |
|----------------------|-----------------------|-----------------|-----------------------|-----------------|
| <i>Ingreso Anual</i> | <i>Promesa Del 1%</i> | <i>12 Pagos</i> | <i>Promesa Del 3%</i> | <i>12 Pagos</i> |
| \$10,000             | \$100                 | \$9             | \$300                 | \$25            |
| \$20,000             | \$200                 | \$17            | \$600                 | \$50            |
| \$30,000             | \$300                 | \$25            | \$900                 | \$75            |
| \$50,000             | \$500                 | \$42            | \$1,500               | \$125           |
| \$75,000             | \$750                 | \$63            | \$2,250               | \$188           |
| \$100,000            | \$1,000               | \$84            | \$3,000               | \$250           |
| \$150,000            | \$1,500               | \$125           | \$4,500               | \$375           |
| \$200,000            | \$2,000               | \$167           | \$6,000               | \$500           |

**THANK YOU! / ¡GRACIAS!**

Please note, the above card is for all parishes inside of Indianapolis. Parishes outside of Indianapolis will not have the option of restricting gifts to the Notre Dame ACE Academies.

# UCA Intention Cards and In-Pew Cards: SPLIT

## *Processing Instructions*

The United Catholic Appeal intention cards and In-Pew cards should be completely filled out by your parishioners. A portion of parishioners will mail their intention card in the envelope provided directly to the post office box. Others will return them to the parish during the In-Pew process on Intention Weekend. All cards returned to the parish should be returned using the UPS envelopes provided by the Office of Stewardship and Development.

### **STEP 1**

**Collect sealed envelopes and place them in the Security Envelope.**

- PLEASE DO NOT OPEN INDIVIDUAL ENVELOPES. You will not be creating batches as in past years. All envelopes are simply collected and placed in the **Security Envelope**.
- IF LOOSE CASH IS RECEIVED, issue a parish check and place in an In-Pew envelope and seal. Label the envelope with the parish name, parish number and city so that we credit your parish with the “loose change” gift. Place in the **Security Envelope**.
- If a donor is interested in making scheduled charge card payments, or would like to schedule an automatic withdrawal, several options are on the pledge card. These options are also available online at [www.archindy.org/UCA](http://www.archindy.org/UCA) by clicking on “Donate Now”. Feel free to contact the office with special instances that you would like to discuss.

### **STEP 2**

**Please use UPS labels provided to your parish in the October 2018 mailing. See instructions on page 9.**

- **Do not use old envelopes with P.O. Box 1410, P.O. Box 6043, or old UPS labels. Using old materials is likely to result in lost envelopes.**
- Place all In-Pew envelopes and intention cards in a **Security Envelope** and seal. The Security Envelope is used to help protect all gifts that are made to the United Catholic Appeal should the outside package be damaged in transit. Then, follow the shipping instructions on page 9.
- Additional supplies can be ordered by contacting Cindy Riley at (317) 236-1415 or [criley@archindy.org](mailto:criley@archindy.org).

### **STEP 3**

If you have questions or suggestions on processing gifts, please call the Office of Stewardship and Development at 800-382-9836, ext. 1498.





(BACKSIDE)

## PARISH COMMUNITY TIME AND TALENT OPPORTUNITIES

Please list the family member's name next to the ministry in which he/she chooses to participate.

|  | FAMILY MEMBER(S) | NEW   | RENEW |  | FAMILY MEMBER(S) | NEW   | RENEW |
|--|------------------|-------|-------|--|------------------|-------|-------|
| <b>Faith Formation Ministry</b>            |                  |       |       | <b>Spiritual Life Ministry, continued</b>  |                  |       |       |
| • Adult Catechetical Team                  | _____            | _____ | _____ | • Lector                                   | _____            | _____ | _____ |
| • Baptismal Preparation                    | _____            | _____ | _____ | • Minister of Hospitality                  | _____            | _____ | _____ |
| • Confirmation Preparation                 | _____            | _____ | _____ | • Liturgy Committee                        | _____            | _____ | _____ |
| • Rite of Christian Initiation of Adults   | _____            | _____ | _____ | • Music Committee                          | _____            | _____ | _____ |
| • Rite of Christian Initiation of Children | _____            | _____ | _____ | • Sacristan                                | _____            | _____ | _____ |
| • Religious Education                      | _____            | _____ | _____ | • Vocations Committee                      | _____            | _____ | _____ |
| – Children                                 | _____            | _____ | _____ |  |                  |       |       |
| – Adult                                    | _____            | _____ | _____ | <b>Family and Social Services Ministry</b> |                  |       |       |
| <b>Stewardship Ministry</b>                |                  |       |       | • Adult Athletics                          | _____            | _____ | _____ |
| • Communications Committee                 | _____            | _____ | _____ | • Basic Christian Community                | _____            | _____ | _____ |
| • Endowment and Planned Giving             | _____            | _____ | _____ | • CYO                                      | _____            | _____ | _____ |
| • Festival Committee                       | _____            | _____ | _____ | • Marriage Preparation                     | _____            | _____ | _____ |
| • Finance Committee                        | _____            | _____ | _____ | • St. Vincent de Paul Society              | _____            | _____ | _____ |
| • Parish Planning Committee                | _____            | _____ | _____ | • Pro Life Committee                       | _____            | _____ | _____ |
| • Stewardship Committee                    | _____            | _____ | _____ | • Scouts                                   | _____            | _____ | _____ |
| • Stewardship Education                    | _____            | _____ | _____ | • Young Adult Catholics                    | _____            | _____ | _____ |
| • Volunteer Coordinator                    | _____            | _____ | _____ | • Youth Ministry                           | _____            | _____ | _____ |
| <b>Spiritual Life Ministry</b>             |                  |       |       | <b>Parish Life Ministry</b>                |                  |       |       |
| • Adult Choir                              | _____            | _____ | _____ | • Building and Grounds                     | _____            | _____ | _____ |
| • Altar Server                             | _____            | _____ | _____ | • Parish Office Volunteer                  | _____            | _____ | _____ |
| • Bible Discussion Group                   | _____            | _____ | _____ | • Funeral Needs                            | _____            | _____ | _____ |
| • Cantor                                   | _____            | _____ | _____ | • Parish Life Committee                    | _____            | _____ | _____ |
| • Children's Choir                         | _____            | _____ | _____ | • Nursery                                  | _____            | _____ | _____ |
| • Christ Renews His Parish                 | _____            | _____ | _____ | • School Commission                        | _____            | _____ | _____ |
| • Evangelization                           | _____            | _____ | _____ | • Parent/Teacher Organization              | _____            | _____ | _____ |
| • Extraordinary Minister of Holy Communion | _____            | _____ | _____ | • Welcome Committee                        | _____            | _____ | _____ |

**Gifts of Talent**  
Do you have other skills, talents or resources you would be willing to share?  
Please describe: \_\_\_\_\_

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P.O. Box 6043  
Indianapolis, IN 46206-6043  
800-382-9836 Ext: 4062  
www.archindy.org/UCA

I want my gift to impact (please select one):

- Fostering Catholic education and faith formation.
- Education for our seminarians and deacons and retirement benefits for priests.
- People in need through our local Catholic Charities agency.
- Underserved students who attend the archdiocesan Notre Dame ACE Academies through need-based scholarships.

### Gift Planning

- Yes, please send information about estate planning, or how to include the Church in my will or trust.
- I already have included the Church in my will or trust.

**SERVING**

### Stock Gift

- Stock gift to be made \_\_\_\_\_  
Stock Symbol/# Shares

### Automatic Transfer

- I will go online at [www.archindy.org/UCA](http://www.archindy.org/UCA) to set up an automatic transfer.
- Please use the attached voided check for automatic transfer.

**LOVING**



To give online, please visit [www.archindy.org/UCA](http://www.archindy.org/UCA).

# UCA Intention Cards and In-Pew Cards: COMBINED

## *Processing Instructions*

The United Catholic Appeal intention cards and In-Pew cards should be completely filled out by your parishioners. A portion of parishioners will return the intention card directly to the parish. Others will complete them during the In-Pew Process on Intention Weekend. All archdiocesan cards should be returned using the UPS envelopes provided by the Office of Stewardship and Development.

### **STEP 1**

#### **Verify contents of return envelopes.**

- You should receive both sections of the pledge cards from every donor. If either the parish or archdiocesan community appeal section is missing, please call the donor to obtain the missing section of the intention card.
- Separate the archdiocesan appeal intention cards from the parish intention cards and retain the parish cards.
- If you see an error on the intention card and/or contribution, please work with the donor to resolve discrepancies. Donor should resubmit the intention card and/or contribution after the discrepancy has been resolved.
- For the United Catholic Appeal intention cards without a preprinted or pre-labeled name and address, please provide the donor's complete name, address, parish name, and parish number.
- IF LOOSE CASH IS RECEIVED, issue a parish check and place in an In-Pew envelope and seal. Label the envelope with the parish name, parish number and city so that we credit your parish with the "loose change" gift. Place in the **Security Envelope**.
- If a donor is interested in making scheduled charge card payments, or would like to schedule an automatic withdrawal, several options are available on the pledge card. These options are also available online at [www.archindy.org/UCA](http://www.archindy.org/UCA) by clicking on "Donate Now". Feel free to contact the office with special instances that you would like to discuss.

### **STEP 2**

#### **To prepare intention cards for the mailing process, ensure:**

- Intention cards are complete and accurate, with total pledge, amount paid, balance and contribution schedule.
- All checks are signed and made payable to United Catholic Appeal with check number provided by the donor.
- All credit card payments are either, Discover, MasterCard, Visa or AmEx, and include a complete account number, expiration date, donor's name as it appears on the credit card and daytime phone number. It is very important to the donors' financial security that we are careful with this information. Please remember all pledge information is confidential. All charge card information must be kept confidential by the parish and the archdiocese.
- Please place the check behind the intention card and bundle together with a rubber band.
- Create a separate bundle for cash donations using the same order as above. Create a separate bundle for credit card donations and bundle with a rubber band if possible. Do not use paper clips and **DO NOT STAPLE**.
- Place all of the secured bundles in the Security Envelope and then insert into the UPS envelope for shipment.

### **STEP 3**

**Please use UPS labels provided to your parish in the October 2018 mailing. See instructions on page 9.**

- **Do not use old envelopes with P.O. Box 1410, P.O. Box 6043, or old UPS labels. Using old materials is likely to result in lost envelopes.**
- Follow the instructions above for bundling procedures and then place all intention cards in a **Security Envelope** and seal. The Security Envelope is used to help protect all gifts that are made to the United Catholic Appeal should the outside package be damaged in transit. Then, follow the shipping instructions on page 9.
- If you have questions, please contact Dana Townsend at 800-382-9836, ext. 1498.

## Returning UPS Envelopes

The archdiocese has provided envelopes with UPS labels for returning United Catholic Appeal intention cards and In-Pew envelopes. Your parish will not be charged for this service if you follow the instructions below.

**DESTROY ANY PREVIOUS UPS OR USPS ENVELOPES YOU MAY STILL HAVE. IF YOU USE OLD ENVELOPES, THE PACKAGES MAY NOT REACH THEIR INTENDED DESTINATION.**

### UPS Instructions

- Make a copy of the UPS label that is on the outside of the shipping envelope for your parish records; note the shipment date on the copied label. Should a package go missing, the copied label and shipment date are critical in tracking down the package in a timely manner.
- **IF LOOSE CASH IS RECEIVED**, issue a parish check and place in an In-Pew envelope and seal. Label the envelope with the parish name, parish number and city so that we credit your parish with the “loose change” gift. Place in the **Security Envelope**.
- The Security Envelope is used to help protect all gifts that are made to the United Catholic Appeal should the outside package be damaged in transit. All gifts made to the United Catholic Appeal should first be inserted into the Security Envelope (see Image 1).
- Insert the Security Envelope into the UPS labeled shipping envelope (see Image 2). Seal the UPS labeled shipping envelope.
- **PLEASE NOTE THE TRACKING NUMBER BEFORE SHIPPING**

Image 1

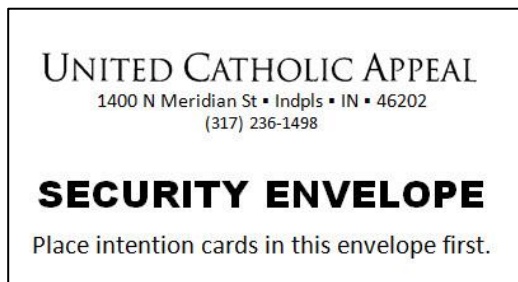


Image 2



UPS labeled envelopes can be returned in one of the following three ways:

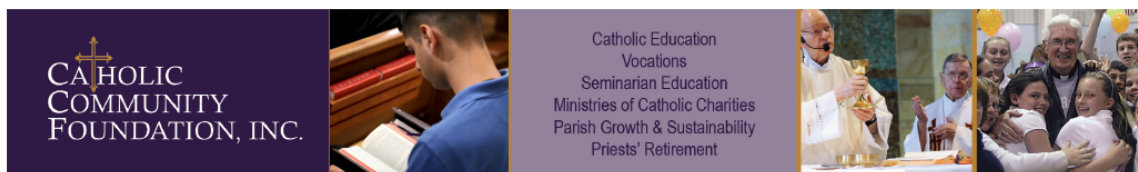
- a. If you have regular UPS delivery service, please have the package shipped through your regular service.
- b. If there is a UPS drop box in your area, it may be used to process the return.
- c. If you do not have regular UPS pickup, please call 800-742-5877 for pickup.

**Please Note: Do not use a Private UPS Store as you will be required to pay the shipping charges.**

# INSTRUCTIONS FOR DONATING STOCK AND MUTUAL FUNDS

The following information can be shared with a donor interested in making payment for their United Catholic Appeal gift through a stock or mutual fund gift.

This is the same process that exists should a donor be interested in making a gift directly to the parish through stock or mutual funds. If you have not utilized this service in the past, please feel free to contact Cindy Riley at (800) 382-9836, ext. 1415 or criley@archindy.org.



## INSTRUCTIONS FOR DONATING STOCK AND MUTUAL FUNDS to Ministries of the Archdiocese of Indianapolis

Thank you for your support of a parish, school or agency of the Archdiocese of Indianapolis. Ministries use a single brokerage account to streamline the process, keep gift-processing expenses low, and ensure an IRS-approved acknowledgement. In order to process your contribution in a timely and efficient manner, please follow the below process to contribute publicly traded securities such as stock and mutual funds and cash through your brokerage account.

**If you have any questions, please contact Cindy Riley at 800.382.9836, ext. 1415 or 317.236.1415.**

### STEP 1: INITIATE THE TRANSFER WITH YOUR BROKER

To transfer stock or mutual funds that are being held electronically, please use the Letter of Authorization (LOA) on the following page and instructions below. It is important that you also contact your financial institution to request their required procedures and forms and provide them with the delivery instructions found below. Include the donor's name on all deliveries.

Deliver all DTC Eligible Securities to:

Morgan Stanley Smith Barney LLC  
DTC Clearing **0015**  
For the account of the **Roman Catholic Archdiocese of Indianapolis**  
Account Number **337-136954**

*Note: Some financial institutions and mutual fund companies require the use of 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 ABOUT YOUR TRANSFER – VERY IMPORTANT

If the Archdiocese is not informed of the details of your transfer, your gift acknowledgement cannot be generated and will be delayed until we hear from you. The stock does not come to the Archdiocese with information about the donor. Therefore, please send a copy of your Letter of Authorization (LOA) in the following manner so that the Archdiocese is aware of your gift and designation instructions:

#### Mail or Overnight Delivery

Roman Catholic Archdiocese of  
Indianapolis ATTN: Cindy Riley  
1400 N. Meridian Street  
Indianapolis IN 46202-2305

#### Email

criley@archindy.org  
*Please Note: Email  
transmissions are not secure*

#### Fax

317.592.4066

*Note: If we do not receive proper notification of a gift, it will be placed into a general fund at the Roman Catholic Archdiocese of Indianapolis until identified.*

### 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.

**LETTER OF AUTHORIZATION**

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm. I understand that I must initiate this transfer with my broker. My intention is to gift these stocks to the Roman Catholic Archdiocese of Indianapolis for the benefit of (list ministry/ministries and desired gift amount(s):

[Redacted]

If you have any questions, or if there is a problem with this transfer, please contact me immediately at the phone number below. This gift is being contributed by the following individuals/entities:

[Redacted]

Donor Name(s)

[Redacted]

Address

Phone Number

Email Address

[Redacted]

Name of Delivering Broker, Address and Phone Number

Anticipated Date of Transfer

[Redacted]

Additional gift information: i.e. Donor ID and pledge year, campaign, parish or school name and address, gift restrictions, etc.

Please irrevocably transfer the following assets:

Cash Contributions: \$ [Redacted]

Stocks, mutual funds, or other publicly traded assets listed below:

[Redacted]

Description of Assets/Name of Security      Symbol    \*\*Number of Shares      Approx. Value

[Redacted]

Description of Assets/Name of Security      Symbol    \*\*Number of Shares      Approx. Value

[Redacted]

Description of Assets/Name of Security      Symbol    \*\*Number of Shares      Approx. Value

*Please initiate the transfer based on the number of shares and not the dollar value since security values may fluctuate. Shares are to be transferred in-kind and are not to be liquidated.*

Please deliver these shares to the following broker:

Morgan Stanley Smith Barney LLC  
DTC Clearing **0015**  
For the account of the **Roman Catholic Archdiocese of Indianapolis**  
Account Number **337-136954**

**SIGNATURES**

This is my/our written authorization to irrevocably transfer ownership of the assets specified in this form to the Roman Catholic Archdiocese of Indianapolis. I understand that any contribution, once accepted, represents an irrevocable contribution to the Roman Catholic Archdiocese of Indianapolis and is not refundable for any reason.

[Redacted]

Donor Full Name (Please Print)

Medallion Signature Guarantee Program Stamp Here  
(If required by your financial institution)

Donor Signature

[Redacted]

Donor 2: Full Name (Please Print)

Donor 2: Signature