# Diocese of Nashville

## Letter of Intention to Donate Stock and/or Mutual Funds

Please complete this form for all stock donations. To return this form, or if you require any assistance, call (615) 783-0783 or e-mail stockgift@dioceseofnashville.com.

**Today's Date *** * indicates a required field

Please indicate the number of shares and the name of the security you would like to donate:

| # of Shares* | Ticker* | Description |
|---|---|---|
| | | |
| | | |
| | | |

**Donor information:**

First and Last Name*:

Spouse's Name:

Address*:

City/State/ZIP*:

Phone Number*:

Email Address*:

**Donation is for the benefit of:**

| Diocesan Organization | Specific Fund or Campaign (Leave Blank if none) | % |
|---|---|---|
| | | |
| | | |
| | | |

Signature: _____ Date: _____

***THANK YOU FOR YOUR GENEROSITY***

***Revised 09/2026***

# Diocese of Nashville

## Stock Gift Donation Instructions

For any stock and/or mutual fund donation for the Diocese of Nashville (Bishop's Appeal, Parish, School, or other ministry), the following instructions will walk you through the steps necessary to complete your donation. Should you require any further assistance, please call (615)783-0783 or email **stockgift@dioceseofnashville.com**.

For all securities donations, the Letter of Intention to Donate Stock and/or Mutual Funds must be completed and submitted to the diocese.

***PREFERRED ELECTRONIC SECURITY DONATION–***
You can then execute your donation by instructing your Broker to transfer the securities as follows:

| | |
|---|---|
| DTC Number: | 8862 |
| Account Number: | 2CS-02123 |
| For the Benefit of: | ROMAN CATHOLIC DIOCESE OF NASHVILLE |

The Letter of Intention to Donate Stock/Mutual Funds must be submitted via email to stockgift@dioceseofnashville.com

Should you have any brokerage questions, please contact the Office of Stewardship and Development at (615) 783-0783.

***ACKNOWLEDGEMENT OF DONATED SECURITIES*** - Upon receipt, Merrill Lynch immediately sells the donated shares at the current market value. The Office of Stewardship and Development will send the proceeds from the sale of stock to the intended ministry and will provide a letter of acknowledegement to you. This letter includes the donated stock or mutual fund, number of shares, and the intended recipient of the donation. The Diocese of Nashville will not attest to the gift value.

***THANK YOU FOR YOUR GENEROSITY***

***Revised as of 09/2026***