



Guidelines for Stock Donation

To the Roman Catholic Diocese of Wheeling-Charleston

When gifting shares of stock to the Diocese of Wheeling-Charleston or the Catholic parish or charity of your choice, please follow the procedures appropriate to your particular holdings.

If you are gifting shares that you currently hold 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 your **Instruction Sheet** (attached) to the Diocese of Wheeling-Charleston Finance Office. This sheet describes your specific instructions on the use of this gift.

If you are gifting shares that you currently hold in a certificate form and the certificate is 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 **Instruction Sheet** (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 you are gifting shares that you currently hold 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 **Instruction Sheet** (attached) which describes your specific instructions on the use of this gift.

If you wish to specify a broker to handle your gift:

- The security may be liquidated once received. If you have a specific broker that you would like to see handle the liquidation trade please indicate his/her name, firm, and telephone number on the **Instruction Sheet** (see attached sheet).



Instruction Sheet

(Gifts of Stock)

To the Roman Catholic Diocese of Wheeling-Charleston

Date: _____ Telephone Number: _____

Social Security Number: _____

Your name: _____

Your Address: _____

Your City/State/Zip: _____

Security Name & Number of Shares being donated: _____

This donation is for the benefit of (parish or charity name / Diocese of Wheeling-Charleston):

I would prefer any liquidation sales to be handled by my broker of choice:

Brokers Name & Firm: _____

Brokers Telephone #: _____

Check one: Please send gift receipt to the above name & address

Please send gift receipt to the name and address below

Name: _____

Address: _____ City/State/Zip: _____

**Forward Form to:
Diocese of Wheeling-Charleston
Finance Office
P.O. Box 230
Wheeling, WV 26003**