



**INSTRUCTIONS FOR MAKING A GIFT OF STOCK TO
CATHOLIC FOUNDATION FOR BROOKLYN AND QUEENS
FOR BLESSED TRINITY PARISH**

Thank you for considering a gift to *Blessed Trinity Parish through the Catholic Foundation* for Brooklyn and Queens. Making a stock gift is a great way to support the works of the Foundation. The transaction is simple and straightforward, has an immediate impact and may also have tax benefits. Please follow the instructions below to transfer stock and/or other securities:

1. **Inform** Blessed Trinity & Catholic Foundation of your intention to transfer securities. Be prepared to provide the following information:
 - a. Donor name, address, phone number and e-mail address;
 - b. Name of stock and number of shares;
 - c. The gift designation;
 - d. The anticipated date of transfer.

2. **Provide** your broker the account information for making an electronic transfer:

Brokerage Firm: Merrill Lynch

DTC #: 8862

Account Name: Catholic Foundation for Brooklyn & Queens

Account #: 5AX03335

3. **Inform** Blessed Trinity & Catholic Foundation again, once your broker has advised you that your transfer is complete.

Once the assets are in our account, there are no additional steps! Catholic Foundation will authorize Merrill Lynch to sell the shares and will send the donor an acknowledgment indicating the cash value of the gift.

Please contact Aida Torres at **718.965.7375 Ext. 1620** or via email at info@cfbq.org for all stock transfer activities and inquiries. Thank you.