



Gifts of stock may be made via electronic transfer. Immaculata Catholic School maintains a brokerage account with Wells Fargo Advisors for the purpose of processing stock transfers to Immaculata for the benefit of Immaculata. Immaculata Catholic School cannot initiate stock transfers on your behalf. You must contact your broker directly.

PLEASE PROVIDE ALL INFORMATION REQUESTED:

NOTICE OF STOCK DONATION:

Name: _____

Address: _____

City: _____

Phone: (work) _____ (home or cell) _____

Name of stock and shares donated:

If securities are electronically transferred, the gift date is the date the securities enter our account at Wells Fargo Advisors. For hand-delivered securities to Immaculata or Wells Fargo Advisors, the gift date is the date received. If the securities are mailed to Immaculata, the gift date is the date of the mailing (recommend sending by registered mail). Stock market fluctuations after the date of delivery (as defined above) will not affect the charitable deduction for tax purposes.

Wells Fargo Advisors has instructions to sell stock as soon as possible (usually by the business day following their receipt of the stock). The actual net proceeds from the sale represent the amount that will be applied as you requested above. The net proceeds will be affected by the actual sale price, as well as a broker charge to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceeds applied

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