



LETTER OF INTENTION TO DONATE STOCK

For any stock and/or mutual fund donation for the Archdiocese of Boston Clergy Health and Retirement Trust, the following instructions will walk you through the steps necessary to complete your generous donation. Should you require a donation package, as discussed below, or need any further assistance, please contact the Clergy Health and Retirement Trust office at 617-746-5725, or email to mbarrett@rcab.org .

For all Securities donations, whether electronically transmitted or delivered as physical certificates, a Donor Letter of Intention must be completed and submitted. If you are donating physical securities (stock or bond certificates), you will also need to provide an Irrevocable Stock or Bond Power. Both of these documents will be provided in a donation package. They are also available for download from our website at www.clergytrust.org. Please complete this form for all Stock and/or Mutual Fund Donations, whether delivered physically or electronically. Return this form by mail, e-mail or fax to Maryellen Barrett. If you require any assistance, please contact Maryellen Barrett at 617-746-5725, by e-mail at mbarrett@rcab.org by fax at 617-779-4570.

I / We plan to transfer the following securities to the Archdiocese of Boston via:

<input type="checkbox"/>	Electronically (Broker to Broker)
<input type="checkbox"/>	Priority Mail (envelope included in package)
<input type="checkbox"/>	Hand Delivered to: Provide Name

Donor Information:

Date of Donation:	
Name(s):	
Address:	
Telephone Number:	
Email Address:	

Please accept our donation of _____ Shares of _____
(# of Shares) (Name of Security)

This donation is to for the benefit of:

Roman Catholic Archbishop of Boston, Clergy Benefit Funding Trust
Tax ID# 45-3995881

Signature: _____ Date: _____

ON BEHALF OF ALL OUR PRIESTS, THANK YOU FOR YOUR KIND GENEROSITY

Revised as of 11/2016