

Diocese of NY and NJ able to accept contributions of financial assets

In response to a number of requests, the Diocese of NY & NJ has established a securities account to facilitate the contribution of financial stocks and other financial investments.

To make a gift of stocks, please inform the Diocesan Treasurer of the company stock/mutual fund you intend to transfer and the approximate value of your gift as well as your stock broker's name and telephone number, and purpose in the Diocese your gift should go towards.

Please email this information to the Diocesan Treasurer:

Matushka Mary Buletza Breton MaryB@rrllp.com (732) 295-1000

Follow the instructions below for the type of asset you are using and then forward all to:

Diocese of New York and New Jersey
P O Box 730
Point Pleasant, NJ 08742-0730
Attn: Matushka Mary Buletza, CPA, Treasurer

Securities registered in book form/street name at a broker: The gift of securities can be transferred to the Diocese of NY & NJ account by providing the following transfer instructions to your broker *exactly as follows:*

- National Financial Services LLC (dba Fidelity Investments)
DTC clearing #0226 for further credit to account #Z49953571
Account Name: Diocese of New York and New Jersey of the Orthodox Church in America

Gift date is the date of receipt in Diocese of NY & NJ's account.

Securities held as physical certificates in your name: You should also sign the backside of the stock certificate or an irrevocable stock power transferring ownership to the Diocese of New York and New Jersey. The signature on the stock power **must be guaranteed** by an eligible guarantor institution such as a commercial bank, trust company, securities broker dealer, credit union, or savings institution participating in a STAMP Medallion program approved by the Securities Transfer Association, Inc.

You should send the stock certificate(s) along with a transmittal letter by certified mail to the Diocese Treasurer. Gift date is the postmark date as mailed to Diocese of New York and New Jersey.

Transferring mutual funds: Most mutual funds can be transferred directly to our broker. The details of the transaction—number of shares and name and CUSIP of the mutual fund, broker's name and contact information—should be provided to the Diocese Treasurer. Gift date is the date of receipt in the National Financial Services House account.

Transferring Government Bonds: Most bonds can be transferred directly to our broker. The details of the transaction—denomination of the bond and name and CUSIP of the bond, broker's name and contact information—should be provided to the Diocese Treasurer. Gift date is the date of receipt in the National Financial Services Account.