

THE ROMAN CATHOLIC
ARCHDIOCESE OF ATLANTA



**INSTRUCTIONS
FOR MAKING A CHARITABLE GIFT OF SECURITIES**

Updated: October 29, 2024

For electronic transfer via broker or bank:

You or your broker or banker should send a letter/email to the following individual at the Archdiocese aware of the impending transfer:

Attn: Tracy Zelczak

Archdiocese of Atlanta

2401 Lake Park Drive, SE

Smyrna, Ga. 30080-8862

Tracy Zelczak: tzelczak@archatl.com, 404-920-7606

The correspondence to the Archdiocese should include the following information:

1. Your name
2. Your parish
3. Name of the security being transferred
4. Number of shares
5. Name of the financial institution handling your transaction
6. The intended beneficiary of your gift (e.g., your parish, Archbishop's Annual Appeal, Catholic Charities, etc.)

You or your broker or banker should also contact Truist Bank to notify them of the pending transfer and the intended beneficiary of the gift:

- Janel Liddel Johnson, Truist Bank, Gift Administrator, 404-230-5036
TruistBankGiftClearing@Truist.com
- Dawn Keevill-Carey, Truist Bank, Gift Administrator (Alternate), 404-588-8296
TruistBankGiftClearing@Truist.com

The tax identification number for the Archdiocese is: 83-3544215

For hand delivery of your gift of securities:

Do not sign your actual certificate(s) until you arrive at the Catholic Center.

The Catholic Center is located at 2401 Lake Park Drive, SE, Smyrna, Ga. 30080-8862. Please contact Tracy Zelczak from the Office of Mission Advancement before you come to alert her when to expect you. You may contact Ms. Zelczak at 404-920-7606 or tzelczak@archatl.com

At the Catholic Center's reception desk, ask for Tracy Zelczak who will receive your gift of securities. Make sure you inform Ms. Zelczak where you want your gift to be allocated. Sign and

date your certificate at the Catholic Center in the presence of Ms. Zelczak. You will receive a receipt for the delivery of the shares (name of owner listed on the shares; number of shares; and the name and class of stock).

You will receive an acknowledgment letter for the gift within 30 days, detailing the receipt of the number of shares, the stock issuer, and the date of the gift.

For the transfer of actual certificates by mail:

Call the Archdiocese of Atlanta first, 404-920-7606, and ask to speak with Tracy Zelczak, to make her aware of your intentions. Please tell her how you want your gift to be allocated. **Do not sign the actual stock certificates.** Mail the actual certificates, by registered mail or express delivery, requesting a signature as proof of delivery, to:

Archdiocese of Atlanta
Attn: Tracy Zelczak
2401 Lake Park Drive, SE
Smyrna, Ga. 30080-8862

In a separate envelope, also by registered mail or express delivery, mail a signed stock power of authority, to transfer ownership of the stock to the Archdiocese.

You will receive an acknowledgment letter/receipt within 30 days, detailing the receipt of the number of shares, the stock issuer, and the date of the gift (for tax purposes).

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Gift Clearing Delivery Instructions

TYPE OF GIFT	INSTRUCTIONS
DTC Eligible Securities (Stocks, Bonds, ETFs)	Participant #2039 SEI Private Trust Co FFC Truist Bank Account Number: 1114530 Account Name: Archdiocese Gift Clearing Donor Name:
Fed Securities	FED: ABA #042000013 US Bank NA/1050 Account 001050985490 FFC Truist Bank Account Number: 1114530 Account Name: Archdiocese Gift Clearing Donor Name:
Global Securities	Contact TruistBankGiftClearing@Truist.com for global delivery instructions
Mutual Funds	Contact TruistBankGiftClearing@Truist.com for Mutual Fund delivery instructions. Include Account Number: 1114530 Account Name: Archdiocese Gift Clearing Donor Name: **It is important to notify Truist of incoming mutual fund gifts to avoid significant processing delays of more than one business week. ACATS participants can use the above DTC eligible securities instructions.
Physical Securities	Truist Bank Physical Custody, Mail Coded 803-05-15-10. 303 Peachtree Street, N.E. 15 th Floor, Suite 1520 Atlanta, GA 30308 *Reference on the documentation accompanying the stock certificate(s) Account Number: 1114530 Account Name: Archdiocese Gift Clearing
Check Instructions	Contact a member of your Client Service Team for instructions.
Wiring Instructions for gifts inside US	Bank Name.....Truist ABA Routing/Transit Number.....053101121 Account Number.....5177620228015 Account Name.....ST DEP-DMS FFC Trust Account Name.....Archdiocese Gift Clearing FFC Trust Account Number.....1114530
Wiring Instructions for gifts outside US Add	SWIFT Code.....BRBTUS33
Contact	Phone number
Janel Liddel Johnson (Gift Administrator) TruistBankGiftClearing@Truist.com	404-230-5076
Dawn Keevill-Carey (Gift Administrator-Alternate) TruistBankGiftClearing@Truist.com	404-588-8296