

Stock Donation Procedure:

- Donor must fill out and print the form above and send to the account executive managing the donor's account. Please call or email Joel Barlow at the phone number or email address below to fill in the account number on the form.
- Donor's account executive at the transferring institution must email, fax or mail this information to the Church Office to ensure their donation is placed in the fund of their choosing and to receive proper credit on their contribution statement.
- Donor or their account executive can contact the following person with any questions about the procedure:

Joel Barlow, CPA, CFP

205-915-0155

joel@allianceplanning.net

1 Perimeter Park South, Ste 318N

Birmingham, AL 35243

Date: _____

FROM (Contributor): _____

TO (Acct. Executive): _____

RE: _____

(Contributor's Account Number at the transferring institution)

Please transfer _____ of shares/bonds of _____
(Number) (Name of stock, bond, mutual fund, etc.)

From the above referenced account to **Fidelity Investments (DTC – 0226)** for credit to the Account Number _____ of the "Diocese of Birmingham in Alabama DBA Our Lady of Sorrows Church - Stock Account" and notify the Church Office shown below of the date of the transfer and the high and low prices for the stock on that date.

I would like this donation to be designated as a gift towards _____.
(School Foundation/Charity/School/Children's Learning Center/General Offertory)

Thank you for your assistance in this matter.

Sincerely,

(Contributor's Signature)

(Print or type contributor's name)

Cc: Our Lady of Sorrows Catholic Church
1730 Oxmoor Road
Birmingham, AL 35209
P: 205-871-8121
F: 205-871-8180
ols@ourladyofsorrows.com