



11800 S Military Lane | Portland, Oregon | 97219
T: 503-636-5613 | F: 503-636-5616
www.diocese-oregon.org

Stock or Mutual Fund Gifting Instructions

On behalf of all of us at the Episcopal Diocese of Oregon, we thank you for your generous Stock, Bond, or Mutual fund gift. To facilitate a smooth transfer, we have provided transfer instructions and are outlined below.

To help us understand how your gift is to be used, we ask that you complete the attached form and email to merony@diocese-oregon.org or mail it to the address listed on the attached form. Please note that emailing and/or mailing this form will provide the necessary information for us to provide you with a receipt and transfer date for your tax records.

In addition to sending the attached instruction form, please instruct your broker to electronically transfer the securities to The Diocese of Oregon account at Raymond James using the information below.

Raymond James Financial Services, Inc **DTC participant number 0725**

Account name: The Diocese of Oregon

Account number: 316NJ469

Raymond James contact:

Chris Meyer

Telephone: 503-203-8585, 800-203-8510

FAX: 503-203-8590 fax

Chris.Meyer@RaymondJames.com

Upon receipt of the gift, we will send you a documentation detailing the date and number of securities received and we will distribute and process your gift according to your instructions on the attached on your Securities Gift form

If you have any questions or would like assistance, please contact Meron Yimesgen at the diocese at 971-204-4120.

Thank you.

Sincerely,
Diocese of Oregon



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SECURITIES GIFT FORM

Name of Donor _____

Gift of Securities:

Type of Securities (*Stocks, Bonds, etc.*) _____

Number of Securities _____

Date of Gift (*dd/mm/yyyy*) ____/____/____

I would like to have my gift distributed as follows:

General Fund Unallocated _____%

Specific Church

Church Name _____ %

_____ %

Specific Ministry (*i.e., Summer Camp Program*)

List:

_____ %

_____ %

Total Allocation of Gift (*note total allocations must add to 100%*) _____%

Please email this security form to Meron Yimesgen at merony@diocese-oregon.org. Or you can mail it to Meron Yimegen at:

Diocese of Oregon
Attn: Meron Yimegen Charitable Gift Coordinator
11800 S Military Lane
Portland, Oregon 97219-8436