



The Diocese of Knoxville

Stewardship & Planned Giving

GIFTS OF STOCK

Thank you for your generous gift of stock. The instructions below have been published by the Diocese of Knoxville's Office of Stewardship and Development to complete your transaction in the most timely and efficient manner possible.

1. Please provide the below information to your broker or financial advisor:

Account Name: Diocese of Knoxville – TAX ID#62-1357183
DTC #: 0221
Account Number: KA28078
Mailing Address: UBS Financial Services, Inc.
800 South Gay Street
First Tennessee Plaza, Suite 2600
Knoxville, TN 37929
Phone Number: 800-827-2723
Contact Name: Tommy Siler

2. Please ask your broker to provide you with the confirmation number received from UBS once the transfer is complete. In turn, provide this confirmation number to the Office of Stewardship and Development:

Contact Name: Deanene Catani, Major Gift and Planned Giving Officer
Phone Number: 865-584-3307
Email Address: dcatani@dioknox.org

3. You will receive a *Gift of Stock Substantiation Form* for your tax purposes at the end of the calendar year.

Please note: To be recorded as a current calendar year donation, the securities must be received by UBS by December 31st. A gift transferred by the donor's broker before December 31st, but received by UBS in January will not qualify as a current calendar year donation. On occasion, transfers are not completed within the same day due to unforeseen circumstances, particularly at year's end.