



**Eternal Word Television Network (EWTN)**  
 STOCK/BOND/MUTUAL FUND/UNIT TRUSTS

Thank you for considering a donation of appreciated securities to further the mission of EWTN. EWTN gladly accepts gifts of stock, bonds, mutual funds or unit trusts in the form of electronic, certificate or direct transfer from a transfer agent or mutual fund company. For the purpose of processing transfers of securities, EWTN maintains a brokerage account with UBS Financial Services, Inc. EWTN cannot initiate securities transfers on your behalf, so you must contact your broker or transfer agent directly. However, we want to make sure that you have the information that you need to process your gift and we want to insure that we are properly acknowledge your gift in a timely manner. To facilitate this process, we would like to provide the following information to you and ask that you assist us in acknowledging your gift by providing us with some information as well. If EWTN does not receive information prior to the transfer of your generous gift, we may not be unable to identify your gift in a timely manner.

**NOTICE OF STOCK/BOND/MUTUAL FUND/TRUST UNITS DONATION:**

\_\_\_\_\_  
 Your Name/Trustee Name

\_\_\_\_\_  
 Spouse Name

\_\_\_\_\_  
 Trust Name

\_\_\_\_\_  
 Acknowledgement Name:

\_\_\_\_\_  
 Address:

_____ House Number and Street Name	_____ Apartment/Unit Number
---------------------------------------	--------------------------------

_____ City	_____ State	_____ Zip
---------------	----------------	--------------

Phone: _____ Home	_____ Work	_____ Cell
----------------------	---------------	---------------

\_\_\_\_\_  
 Email:

\_\_\_\_\_  
 Special Designations:

\_\_\_\_\_  
 \_\_\_\_\_

*Please send this page via mail or email to:*  
**Ryan Flood - Director, Legacy Giving Program**  
**5817 Old Leeds Road**  
**Birmingham, AL 35210**  
**205-569-2674**  
**rflood@ewtn.com**

**A. ELECTRONIC TRANSFER BY BROKERAGE FIRM**

**Please communicate the following information to your broker (your brokerage firm may be able to utilize this letter of authorization, but please send a copy to us as well):**

To: \_\_\_\_\_

Broker Name

\_\_\_\_\_  
Firm Name

\_\_\_\_\_  
Account Number

Stock:

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ from my account.

Bond:

Please transfer \_\_\_\_\_ face value of \_\_\_\_\_ from my account.

Mutual Fund:

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ from my account.

Trust Units:

Please transfer \_\_\_\_\_ units of \_\_\_\_\_ from my account.

To:

**UBS Financial Services, Inc.  
12600 Deerfield Parkway  
Suite 400  
Alpharetta, GA 30004**

**Eternal Word Television Network, Inc.**

**Account #: Ai07699**

**DTC #: 0221**

**Please contact prior to delivery:**

**Ginger Queener or Graham Tudor at 678.518.3630**

I / we hereby authorize the above transfer:

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

**Please sign as registered on the account from which you are transferring**

**Please note:** For electronically transferred donations, the gift date is the date the securities are in good delivery with UBS Financial Services, Inc. - this may not be the date that the securities are received. UBS Financial Services, Inc. has instructions to sell the security as soon as possible (usually by the business day following their receipt of the stock/bond/mutual fund). The actual net proceeds from the sale represent the amount that will be applied as you requested above. The net proceeds will be affected by the actual sale price on the date of sale, as well as any fees to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceeds applied from the gift. EWTN is not responsible for any variance in these amounts.

## B. ELECTRONIC TRANSFER BY TRANSFER AGENT/MUTUAL FUND COMPANY

Please contact the transfer agent/mutual fund company directly as they have proprietary forms that will need to be filled out to make the transfer. You will need the following information to complete the transfer:

**Eternal Word Television Network, Inc.**  
**5817 Old Leeds Road**  
**Birmingham, AL 35210**  
**Tax ID# 63-0801391**  
**Principal Officer: Michael Warsaw, Chairman and CEO**

*Direct Contact:*  
**Ryan Flood - Director, Legacy Giving Program**  
**205-569-2674**  
**[rflood@ewtn.com](mailto:rflood@ewtn.com)**

In most all cases, the original paperwork provided by the transfer agent or Mutual Fund Company will need to be signed by EWTN representatives and both your signature and EWTN representative signatures will need to be medallion guaranteed. Please send the original paperwork directly along with a copy of page 1, Notice of Donation, to:

**Ryan Flood, Director, Legacy Giving Program**  
**EWTN**  
**5817 Old Leeds Road**  
**Birmingham, AL 35210**

Please contact Ryan at **205-569-2674** or by email at **[rflood@ewtn.com](mailto:rflood@ewtn.com)** and let him know that you are sending this information so we can make sure we receive it. We will obtain EWTN signature and medallion guarantee of EWTN signature. Once complete, we will send back the forms to you so you are able to forward to the transfer agent or mutual fund Company for processing. Should you need your signature medallion guaranteed, please send a copy of your driver's license or state issued identification and we can have this processed for you.

**Please note:** *For donations through a transfer agent or mutual fund company – EWTN will not be able to follow up to make sure that the instructions have been received or processed – the persons listed on the account will need to follow up directly with those firms to insure that they received the completed paperwork and donation is being processed. The gift date is the date the securities are in good delivery with UBS Financial Services, Inc. - this may not be the date that the securities are transferred into EWTN's name. In addition, please know that this can take 4-6 weeks to process. For year-end donations, please allow enough time. UBS Financial Services, Inc. has instructions to sell the security as soon as possible (usually by the business day following their receipt of the stock/bond/mutual fund). The actual net proceeds from the sale represent the amount that will be applied as you requested above. The net proceeds will be affected by the actual sale price on the date of sale, as well as any fees to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceeds applied from the gift. EWTN is not responsible for any variance in these amounts.*

## C. DONATION OF PHYSICAL CERTIFICATE(S)

The following is the information that will be needed to process a physical certificate. Please note that in order to receive and have physical certificate(s) processed, all donors listed on the certificate(s) must be living and able to sign paperwork.

### Step 1:

Please call Ginger Queener or Graham Tudor of UBS Financial Services, Inc. at 678-518-3630. They will need to know the name of the security you are donating, how the certificate(s) is /are registered and the number of shares of certificate or of each certificate. They will send you two UPS envelopes, stock power and Letter of Instruction for your signature.

### Step 2:

Upon receipt of the items from UBS, please prepare the following:

- A. Original certificate(s) unsigned and not altered in any way front or back.
- B. Please sign the stock power just like the front of the certificate reads – do not fill in any other information.
- C. Please sign letter of authorization.
- D. Please make a copy of driver's license or state issued identification for each person who signs the stock power and letter of authorization.
- E. Please fill out Page 1, NOTICE OF DONATION.

### Step 3:

- A. Place unsigned and unaltered certificate(s) in one of the overnight envelopes by itself.
- B. Place the stock power, letter of authorization, notice of donation and copies of driver's license in the second envelope.
- C. Drop the envelopes at the nearest UPS location or call UPS for pick up.
- D. Call Ginger Queener or Graham Tudor of UBS Financial Services, Inc. and let them know that you have sent the UPS packages back. They will be able to track the packages and will let you know when they have arrived.

**Please note:** For donations of stock or bond certificates – this is a lengthy process and can take 6-12 weeks to complete. Upon receipt of the requested information, UBS Financial Services, Inc. will need to obtain certain items directly from EWTN to process the request. The gift date is the date the securities are in good delivery with UBS Financial Services, Inc. - this is not be the date that the securities are received by UBS or deposited into EWTN's account. Certificate transfer must go through a comprehensive legal re-registration process and if there is additional information that is required by the transfer agent of the security, it can extend the process. For year-end donations, please allow enough time. UBS Financial Services, Inc. has instructions to sell the security as soon as possible. The actual net proceeds from the sale represent the amount that will be applied as you requested above. The net proceeds will be affected by the actual sale price on the date of sale, as well as any fees to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceeds applied from the gift. EWTN is not responsible for any variance in these amounts.

