

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](mailto: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](mailto:TruistBankGiftClearing@Truist.com)
- Dawn Keevill-Carey, Truist Bank, Gift Administrator (Alternate), 404-588-8296  
[TruistBankGiftClearing@Truist.com](mailto: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](mailto: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).

**Continued on next page**



## Gift Clearing Delivery Instructions

| TYPE OF GIFT  | INSTRUCTIONS  |
|---|---|
| DTC Eligible Securities<br>(Stocks, Bonds, ETFs)  | Participant #2039 SEI Private Trust Co<br>FFC <b>Truist Bank</b><br>Account Number: 1114530<br>Account Name: Archdiocese Gift Clearing<br>Donor Name:   |
| Fed Securities  | FED: ABA #042000013<br>US Bank NA/1050<br>Account 001050985490<br>FFC Truist Bank<br>Account Number: 1114530<br>Account Name: Archdiocese Gift Clearing<br>Donor Name:  |
| Global Securities   | Contact <a href="mailto:TruistBankGiftClearing@Truist.com">TruistBankGiftClearing@Truist.com</a> for global delivery instructions   |
| Mutual Funds  | Contact <a href="mailto:TruistBankGiftClearing@Truist.com">TruistBankGiftClearing@Truist.com</a> for Mutual Fund delivery instructions. Include<br>Account Number: 1114530<br>Account Name: Archdiocese Gift Clearing<br>Donor Name:<br><b>**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.</b> |
| Physical Securities   | Truist Bank<br>Physical Custody, Mail Coded 803-05-15-10.<br>303 Peachtree Street, N.E.<br>15 <sup>th</sup> Floor, Suite 1520<br>Atlanta, GA 30308<br>*Reference on the documentation accompanying the stock certificate(s)<br>Account Number: 1114530<br>Account Name: Archdiocese Gift Clearing   |
| Check Instructions  | Contact a member of your Client Service Team for instructions.  |
| Wiring Instructions for gifts<br>inside US  | Bank Name.....Truist<br>ABA Routing/Transit Number.....053101121<br>Account Number.....5177620228015<br>Account Name.....ST DEP-DMS<br>FFC Trust Account Name.....Archdiocese Gift Clearing<br>FFC Trust Account Number.....1114530   |
| Wiring Instructions for gifts<br>outside US <b>Add</b>  | SWIFT Code.....BRBTUS33   |
| <b>Contact</b>  | <b>Phone number</b>   |
| Janel Liddel Johnson (Gift Administrator)<br><a href="mailto:TruistBankGiftClearing@Truist.com">TruistBankGiftClearing@Truist.com</a>         | 404-230-5076  |
| Dawn Keevill-Carey (Gift Administrator-Alternate)<br><a href="mailto:TruistBankGiftClearing@Truist.com">TruistBankGiftClearing@Truist.com</a> | 404-588-8296  |