



Stock Transfer Instructions

Step One: Complete Donor Information

To ensure the intent of your gift, please complete the following information.

Donor Name: _____

(Unless Anonymous)

Donor Address: _____

City: _____ State: _____ Zip: _____

Parish Name: _____ City: _____

Number of Shares: _____ **Name of Stock:** _____

(Note: *If Mutual Fund, please call for separate instructions*)

Firm that currently holds Stock Shares: _____

Intention of Gift:

Specify: _____

Please transfer the above stated stock as a charitable contribution to The Catholic Foundation for the People of the Diocese of Rockford as listed below:

Donor Signature(s): _____ **Date:** _____

_____ **Date:** _____

Step Two: Please submit a copy via fax (815) 399-5591, e-mail DOMalley@RockfordDiocese.org or mail to my attention to ensure that the gift is properly identified.

Step Three: Please submit this form to your Transfer Agent (Broker):

Broker Number (DTC): 0141

Broker Name: Wells Fargo Advisors

Mailing Address: P.O. Box 6307
Rockford, IL 61125
(815) 921-0555

If Sending: (FedEx, UPS, DHL)
6801 Springcreek Rd.
Rockford, IL 61114-7420

Phone:

Account Name: Catholic Diocese of Rockford (FEIN: 36-3537989)

Account Number: 4396-1171 Rep # 7B2C

Comments: Please reference the donor's name or donee organization for tax recognition purposes.

Thank you,

Daniel O'Malley
Executive Director