



Finance
Office

Diocese of Rockford

555 Colman Center Dr.
P.O. Box 7044
Rockford, IL 61125

(815) 399-4300
Fax: (815) 399-5591

Stock Transfer Instructions – PARISH/DIOCESE

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: _____

Name of Stock: _____ Number of Shares: _____

Name of Stock: _____ Number of Shares: _____

Firm that currently holds Shares: _____ Ph#: _____

Intention of Gift (Check one):

Above Parish: _____ General Diocese: _____ Other: _____

Specific purpose (if any) _____

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

Donor Signature(s): _____ Date: _____

_____ Date: _____

Step Two: Please submit a copy via fax (815) 399-5591, e-mail Foundation@RockfordDiocese.org or mail to the Finance Department at the address above to ensure that the gift is properly identified.

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

Broker Number (DTC):	0141	To mail via FedEx, UPS or DHL send to:
Broker Name:	Wells Fargo Advisors	
Mailing Address:	P.O. Box 6307	6801 Springcreek Rd.
	Rockford, IL 61125	Rockford, IL 61114-7420
Phone:	(815) 921-0555	
Account Name:	Catholic Diocese of Rockford (FEIN: 36-0879840)	
Account Number:	1983-1345 Rep # 7B2C	

REQUIRED MEMO FIELD: Enter “Client/Donor’s Name-CDOR, Parish Name, City”. This information is required to properly identify the donor for gifting and tax purposes. For example: Jane Smith-CDOR, St. Mary, Aurora

Thank you,
Finance & Administration Office