



Charitable Giving
Office

Diocese of Rockford

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

(815) 399-4300
Fax: (815) 399-5657

Stock Transfer Instructions - DIOCESAN APPEAL

Step One: Complete Donor Information

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

Donor Name: _____

Donor Address: _____

City, State, Zip: _____

Parish Name: _____ City: _____

Name of Stock: _____ Number of Shares: _____

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

Firm that currently holds stock shares: _____

To my transfer agent:

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

Donor Signature _____ Date _____

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

Broker Number (DTC): 0141

Mailing Address: Wells Fargo Advisors
PO Box 6307
Rockford, IL. 61125

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

Phone Number: (815)921-0555

Account name: Diocesan Stewardship
Catholic Diocese of Rockford (FEIN: 36-0879840)

Account Number: 1990-5622 Rep# 7B2C

Required Memo Field: (Type in "Diocesan Stewardship" and Donor's name - must be filled in for
gifting and tax purposes)

Step Three: Transfer Agent, please submit a copy via fax or mail to Dan O'Malley to ensure
that the gift is properly identified. Email: domalley@rockforddiocese.org

Thank you