

DIOCESE OF SANTA ROSA

Phone: (707) 566-3300
Fax: (707) 542-9702



CHANCERY

P.O. Box 1297
Santa Rosa, California 95402

Electronic Transfer of Securities Form

Name: _____

Address: _____

Phone Number: _____

Email: _____

The date I requested the transfer of securities: _____

Name of Brokerage Firm: _____

Phone Number of Brokerage Firm: _____

Donated stock should be sent by donor's stock brokerage to:

Merrill Lynch
DTC Clearing Number 8862
Federal Tax ID Number 94-1530038
Account number 284-04A15

Merrill Lynch Contact:
Katie Kelly (916) 648-6333
katie.kelly@ml.com

To the Benefit of: The Roman Catholic Bishop of Santa Rosa

Corporate Name of Gifted Securities	CUSIP #	Number of Shares
_____	_____	_____
_____	_____	_____

Please use my gift for: (Select at least one):

- Annual Ministry Appeal
- Catholic Charities
- Marian Sisters
- Parish _____
(Name/City)
- School _____
(Name/City)

NOTE: If no selection is made above, your donation will be applied where the Bishop sees the greatest need. Merrill Lynch will issue a statement of value of the securities received and the Diocese will confirm with a donation letter for value received for tax reporting purposes.

Please send a copy of this form to:

Controller: Kim Sampietro
Email: ksampietro@srdiocese.org
Phone (707) 566-3383 Fax (707) 542-9702

Diocese of Santa Rosa
Accounting Department
P.O. Box 1297
Santa Rosa, CA 95402