



Stock Donation Instructions

Thank you very much for supporting the mission of the Diocese of Joliet with a gift of appreciated stock. To complete your donation, please follow the steps outlined below. If further assistance is required, please contact Paula Steffensmeier at (815) 221-6202 or via email at psteffensmeier@dioceseofjoliet.org

1. Complete and Submit the Stock Donation Letter of Intention (see Page 2)

Please complete the **Stock Donation Letter of Intention** – Page 2 of this document for proper processing and identification of the donor. Once complete, please mail, fax, or email the Letter of Intention to the Diocese of Joliet, Attn: Paula Steffensmeier. Additionally, if the donation is intended for a parish, school or other organization, please send a copy to that organization.

Without a completed Letter of Intention, we will not know where to send the proceeds of the donation.

2. Transfer the stock

You may transfer stock electronically (preferred), by mail, or in person.

a. To transfer the securities electronically:

1. Contact your broker with instructions to make a transfer from your account to the Diocese of Joliet account.

Receiving Firm Name: LPL Financial
Diocesan Broker Name: Stofan, Agazzi & Co., Inc., Attn: Irene Celander
Address: 2801 Black Rd # 101, Joliet, IL 60435-2702
Phone: (815) 729-1266
Registration of Account: Roman Catholic Diocese of Joliet
DTC: #0075
Diocesan Account #: 5622-6755

b. To transfer certificates by mail:

1. **DO NOT SIGN** the stock certificate.
2. Send the certificate and a completed Stock Donation Letter of Intention (Page 2) by registered mail to:
Roman Catholic Diocese of Joliet
Blanchette Catholic Center
16555 Weber Road
Crest Hill, IL 60403
Attn: Paula Steffensmeier
3. **In a separate envelope** send a completed, signed, dated and **guaranteed Irrevocable Stock or Bond Power form** - Page 3 of this document, together with a copy of the completed Stock Donation Letter of Intention.

c. To hand deliver the securities:

1. **DO NOT SIGN** the stock certificate.
2. Contact Paula Steffensmeier of the Diocese of Joliet at (815) 221-6202 to arrange a time to deliver the stock certificate(s), Irrevocable Stock or Bond Power and Stock Donation Letter of Intention.

Payment Processing and Acknowledgement of Donation

The Diocese of Joliet acts as a clearing house for donations of stock. When securities are donated, the Diocese of Joliet's brokerage firm (Stofan, Agazzi & Co.) liquidates the securities and sends the proceeds to the Diocese along with a trade confirmation form. The Diocese forwards the proceeds to the parish, school, or other institution as directed by the information provided in the **Stock Donation Letter of Intention**. Acknowledgement of the gift will be sent to the donor by the final gift recipient, not by the Diocese of Joliet.



STOCK DONATION LETTER OF INTENTION

Please complete this form for all stock donations and forward to the diocese via email to psteffensmeier@dioceseofjoliet.org.
You may also submit this form by mail to:

Roman Catholic Diocese of Joliet
Blanchette Catholic Center
16555 Weber Road
Crest Hill, IL 60403
Attn: Paula Steffensmeier

AND PLEASE ALSO FORWARD TO:

Parish, School or other Institution for which the donation is intended (if other than the Diocese of Joliet).

Donor Information:

Donor Name: _____ Date: _____

Donor Address: _____

City: _____ State: _____ Zip: _____

Donor Parish or School: _____

Donation Information:

Name of Stock: _____ Number of Shares: _____

Intention of Gift (please check one):

_____ Catholic Ministries Annual Appeal (Diocese of Joliet)

_____ Catholic Education Foundation (Diocese of Joliet)

_____ Parish (Specify below)

_____ School (Specify below)

_____ Other Institution (Specify below)

If Parish, School or other Institution please specify:

Name of Parish, School or other Institution: _____

Address: _____

City: _____ State: _____ Zip: _____

Donor Broker: _____

I (we) plan to transfer the securities (please check one of the following):

_____ electronically

_____ by mail

_____ delivered in person

Donor Signature(s): _____ Date: _____

Donor Signature(s): _____ Date: _____



IRREVOCABLE STOCK/BOND POWER

FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign and transfer to

**IF STOCK
COMPLETE
THIS
PORTION**

_____ shares of the _____ stock of _____
represented by Certificate(s) No.(s) _____ inclusive,
standing in the name of the undersigned on the books of said Company.

**IF BOND
COMPLETE
THIS
PORTION**

_____ bonds of _____
in the principal amount of \$ _____, No.(s) _____ inclusive,
standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint _____
_____ attorney to transfer the said stock or bond(s), as the case may be, on
the books of said Company, with full power of substitution in the premises. **Dated** _____

SIGN HERE ONLY



