Diocese of Joliet
Blanchette Catholic Center

16555 Weber Road
Crest Hill, IL 60403
Tel: 815-221-6100
Fax: 815-221-6083
www.dioceseofjoliet.org

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 Jody Mech at (815) 221-6202 or via email at jmech@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: Jody Mech. 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.

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:	#0141
Diocesan Account #:	2496-9663

   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: Jody Mech
      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 Jody Mech 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.

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STOCK DONATION LETTER OF INTENTION

Please complete this form for all stock donations and forward to the diocese via email to jmech@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: Jody Mech

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):

_____Ministries 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: _____

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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 ☞

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☒ _____

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