Diocese of Joliet
Blanchette Catholic Center

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.

12/2/19
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

X ______________________________________

X ______________________________________

X ______________________________________

12/2/19