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 the Development Office at (815) 838-8515 or development@dioceseofjoliet.org.

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: Development Office. 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.

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: Development Office
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 the Diocese of Joliet Development Office at (815) 838-8515 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 development@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: Development Office

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

__________________________________________
__________________________________________
__________________________________________

____________________ 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 STOCK 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.

IF BOND COMPLETE THIS PORTION

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

__________________________________

__________________________________

__________________________________

06/08/22