Stock Donation Instructions

Thank you very much for supporting the mission of the Saints Peter and Paul Catholic Church with a gift of appreciated stock.

To complete your stock donation, please follow the steps outlined below.

Notify Parish
Please notify Tom Boler, Parish Finance Manager, at 630-718-2100 or by email tboler@sspeterandpaul.net of the pending stock transfer transaction, so that your donation is properly recorded for follow up and acknowledgment.

The next steps involve your broker or transfer agent, the Diocese of Joliet Finance Office and the broker for the Diocese of Joliet. If further assistance is required, please contact Jody Mech in the Diocese of Joliet, Finance Office at (815) 221-6202 or via email at imech@dioceseofjoliet.org.

1. Complete and Submit the Stock Donation Letter of Intention (see Page 3)
   To begin the process of donating stock, please complete the Stock Donation Letter of Intention on page 3 of these instructions. Once completed, please mail, fax, or email the Letter of Intention to the Diocese of Joliet, Attn: Jody Mech.
   - Email Letter of Intention: imech@dioceseofjoliet.org
   - Mail Letter of Intention:
     Roman Catholic Diocese of Joliet
     Blanchette Catholic Center
     16555 Weber Road
     Crest Hill, IL 60403
     Attn: Jody Mech
   - FAX Letter of Intention: 815-221-6083

Additionally, if the donation is intended for an institution other than the Diocese of Joliet, please send a copy to the parish or institution for which the donation is intended. Due to the fact that electronic transfers are made without identifying the donor, a Stock Donation Letter of Intention is required for identification of the recipient.

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

2. Transfer the stock
   You may transfer stock by one of three methods: electronically (preferred), by mail, or in person.
   a. To transfer the securities electronically (preferred method):
      1. Contact your broker and with instructions to make a transfer from your account to the Diocese of Joliet account.
      2. Provide your Transfer Agent (Broker) with the following information:
         - Diocesan Broker Name: Stofan, Agazzi & Co., Inc., Attn: Irene Celandier
         - 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
2. Transfer the stock (continued)
   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 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 4 of these instructions, 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 stocks are donated, the Diocese of Joliet’s brokerage firm (Stofan, Agazzi & Co.) liquidates them and sends the resulting cash to the Diocese along with a trade confirmation form. **The Diocese forwards the proceeds to the parish, school, or other institute 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 recipient, not from 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 imech@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: ___________________
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