

ARCHDIOCESE OF CHICAGO

Financial Operations
Archdiocesan Bank - Stock Donation



835 N. Rush Street
Chicago, Illinois 60611
312/534-5399
Fax: 312/534-5272

Stock/Mutual Fund Donation Procedures

For the Archdiocese of Chicago Parishes, Schools and Agencies.

Thank you very much for your interest in donating to an Archdiocese of Chicago Parish, School or Agency. Please follow the steps outlined below. If further assistance is required, please contact the Archdiocesan Bank.

Complete and send the Stock Donation LETTER OF INTENTION.

ALL STOCK DONATIONS MUST BE ACCOMPANIED BY a stock donation Letter of Intention form (see page 3).

Additional forms may be obtained by:

- Visiting our website at www.archchicago.org - (Click on the following: Departments - Parish Operations - Archdiocesan Bank - Stock Donation Procedures - Letter of Intention.)
- Calling the Archdiocesan Bank at 312/534-5399.

Complete Letter of Intention form may be faxed, mailed or e-mailed (see contact information, page 3).

SECURITIES & STOCK CERTIFICATE(S) DONATION:

Transfer the Stock/Securities

For your convenience, you can transfer securities electronically, by registered mail, or hand delivery.

1. **ELECTRONICALLY** - To transfer the securities electronically:
 - Provide your bank or broker the following transfer instructions:
William Blair & Company - DTC #771
Account Number - 156-16135-1-2
Catholic Bishop of Chicago Account
For the Benefit of: Enter your Parish, School, Agency & City
 - Additional information your bank or broker may need:
Archdiocese of Chicago Tax ID No. - 36-2170826
William Blair & Company - 222 W. Adams St. - Chicago, IL 60606
William Blair Representative Cliff Kalish, Phone: 312/364-8239, Fax: 312/577-0658 or e-mail: <mailto:ckalish@williamblair.com>
2. **REGISTERED MAIL** - To transfer the stock certificate by Registered Mail:
 - Stock certificate(s) in the name of the parish, school, or agency can be sent to us without a signature or irrevocable stock bond power. Place the Stock Certificate(s) and the stock donation Letter of Intention in an envelope and send via **REGISTERED MAIL**.

- Stock certificate(s) in the Donor's name - **DO NOT SIGN** the stock certificate(s). Send the Stock Certificate(s) to us in one envelope via Registered Mail. In a separate envelope send a completed, signed and dated irrevocable stock bond power form, together with the completed stock donation **Letter of Intention** (see page 3 for mailing address).
 - An irrevocable stock bond power form is available on our website: <http://www.archchicago.org> - (Click on Departments - Parish Operations – Archdiocesan Bank - Stock Donation Procedures - Irrevocable stock bond power form.)
3. **HAND DELIVER** - to deliver the securities (stock certificate) in person:
- **DO NOT SIGN** the stock certificate(s).
 - Contact the Archdiocesan Bank at 312/534-5399 to arrange a time to deliver the stock certificate(s), irrevocable stock bond power and stock donation **Letter of Intention**.

Please note: Stock Certificates received stamped “RESTRICTED” will experience longer processing times.

MUTUAL FUND DONATIONS

ALL Mutual Fund Donations –

Due to various methods of transactions required to obtain funds from mutual fund accounts, the Archdiocesan Bank recommend that the Parish, School, Agency or Donor contact us directly at 312/534-5399.

The Archdiocesan Bank will obtain all information as required and process the transaction accordingly.

Please note: Mutual fund donations experience longer processing times. Please keep this in mind when donating at the end of the calendar year.

Thank you for your donation.

ARCHDIOCESE OF CHICAGO

Department of Finance
Post Office Box 1979
Chicago, Illinois 60690-1979



Financial Operations
835 N. Rush St.
Chicago, IL 60611
Phone (312) 534-5399
Fax (312) 534-5272

STOCK DONATION - **LETTER OF INTENTION** For the Archdiocese of Chicago Parishes, Schools, and Agencies

Donor: Please complete this form for ALL STOCK/MUTUAL FUND donations.

For further assistance, please call Greg Salm, Archdiocese of Chicago, Bank Manager at (312) 534-5399.

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

<input type="checkbox"/>	Electronically
<input type="checkbox"/>	By Registered Mail
<input type="checkbox"/>	By Hand Delivery

Donation Date: _____

From: (Please Print)

Donor Name(s):
Address:
City, State, Zip:
Telephone:
E-Mail Address:

Please accept our donation of _____ Shares of _____
(# of shares) (Name of Security)

to be credited to the Catholic Bishop of Chicago for the benefit of:

Parish, School or Agency:
Address:
City, State, Zip:
Other Information:

(If you are donating various stocks/securities and/or to various locations, simply print "VARIOUS" above and attach a separate page with a list detailing the various gifts and locations that are to receive the gift/s).

Send this form using one of the following:

- Regular U.S. Mail: Archdiocese of Chicago
Archdiocesan Bank – Stock Donations
835 N. Rush St.
Chicago, IL 60611
- Fax Number: (312) 534-5272
- E-Mail Address: gdsalm@archchicago.org

Thank you for your donation.