



Empower Individuals | Strengthen Families

Making Your Gift of Stock

Catholic Charities, Diocese of Des Moines

Please follow the instructions below to make a gift of stock to Catholic Charities, Diocese of Des Moines.

Notify Debra Powers in the Development Office, 563-275-9643 or dpowers@catholiccharitiesdm.org when you make your gift so that it is properly credited to your account.

IF THE STOCK CERTIFICATE(S) ARE HELD BY A BROKERAGE FIRM OR FINANCIAL INSTITUTION, YOU SHOULD PROVIDE THE INFORMATION BELOW TO YOUR BROKER OR FINANCIAL INSTITUTION. UPON TRANSFER OF THE STOCK, PLEASE COMPLETE A LETTER OF NOTIFICATION (ATTACHED) OR AN EMAIL WITH THE DETAILS OF YOUR GIFT AND SEND IT TO THE DIOCESAN STEWARDSHIP OFFICE.

1. The advisor for the Diocese of Des Moines is **Jason Egge**.

Mailing Address

Pershing LLC
12324 Port Grace Blvd.
La Vista, NE 68128
(800) 747-6111

2. Pershing LLC, **DTC number: 0443**
3. Official name of the Catholic Charities account is: **Roman Catholic Diocese of Des Moines**
4. Catholic Charities account number: **73U444848**
5. A note on the transfer should indicate that the stock is for the benefit of Catholic Charities of the Diocese of Des Moines.
6. Donors **are asked to send a Letter of Notification (attached) or an email** with details of the stock transfer (number of shares and type of stock) to the Catholic Charities Development Office to receive the stock into the Charities account and credit the correct donor account. Text 563-275-9643 or email to dpowers@catholiccharitiesdm.org.

Notification of Stock Transfer

Date _____

Catholic Charities, Diocese of Des Moines
Attn: Debra Powers - Development
601 Grand Avenue
Des Moines, IA 50309

RE: Account 73U444848

Dear Bishop Joensen:

Please accept this as my notification of a deposit of (#) _____ shares of
(name/ticker symbol) _____ stock in to account
73U444848 for Catholic Charities, Diocese of Des Moines. Please credit my account for the
purpose of _____. (i.e. Catholic Charities,
Refugee Program, Emergency Family Shelter, etc.)

This transfer is being made without valuable consideration, and I hereby agree to hold you
harmless in this matter.

Sincerely,

Please print your name

Signature

Phone number

.....
Please send this form to:

Catholic Charities
Attn: Debra Powers – Development
601 Grand Avenue
Des Moines, IA 50309

Text to (563)275-9643 or email to dpowers@catholiccharitiesdm.org.