



Empower Individuals | Strengthen Families

Making Your Gift of Stock Catholic Charities of Des Moines

Please follow the instructions below to make a gift of stock to Catholic Charities of Des Moines. Please notify Bobbi Jo Smith in the development office (515-237-5064 or bsmith@catholiccharitiesdm.org) at the time 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 DIRECTOR OF DEVELOPMENT.

1. The receiving firm for the Diocese of Des Moines is **Bankers Trust**.
1. SEI Private Trust Company, **DTC number is 2663**.
2. 3. The official name of the Catholic Charities account is: **Roman Catholic Diocese of Des Moines**.
3. The Catholic Charities account number is: **0191311612**.
4. A note on the transfer should indicate that the stock is for the benefit of Catholic Charities of the Diocese of Des Moines, as well as the account number.
5. Donors ***are asked to please 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 so they can receive the stock into the Charities account and credit the correct account. Mail to the address below or email to bsmith@catholiccharitiesdm.org.

Catholic Charities of Des Moines
Attn: Bobbi Jo Smith, Director of Development
601 Grand Avenue
Des Moines, IA 50309

Notification of Stock Transfer

Date _____

Catholic Charities of Des Moines
Attn: Bobbi Jo Smith, Director of Development
601 Grand Avenue
Des Moines, IA 50309

RE: Account 0191311612

Dear Bishop Joensen:

Please accept this as my notification of a deposit of (#) _____ shares of
(name/ticker symbol) _____ stock in to account 0191311612 for
the Catholic Charities 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 of Des Moines
Attn: Bobbi Jo Smith, Director of Development
601 Grand Avenue
Des Moines, IA 50309
or
email to bsmith@catholiccharitiesdm.org