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## STOCK/MUTUAL FUND DONATION PROCEDURES

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### 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](http://www.archchicago.org) – Click on the following: *Offices and Ministries – Bank/Investments – Stock Donation Procedures (under “Links”) – Letter of Intention.*
- Calling the Archdiocesan Bank at (312) 534-5399.

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

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## SECURITIES & STOCK CERTIFICATE(S) DONATION

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### Transfer Stock/Securities

For your convenience, you can transfer securities electronically, by registered mail, or via in-person delivery.

1. **ELECTRONICALLY** - To transfer the securities electronically:
  - Provide your bank or broker the following transfer instructions, our broker is William Blair & Company:  
**Processor: National Financial Services – DTC #0226**  
**Account Number – ESR-005570**  
**Catholic Bishop of Chicago Account**  
**For the benefit of (F/B/O): Enter your Parish, School, or Agency Name Address and Intent**
  - Additional information your bank or broker may need:  
Archdiocese of Chicago Tax ID No.: 36-2170826  
William Blair & Company:  
150 North Riverside Plaza - Chicago, Illinois 60606
  - William Blair Representatives:  
Charlie Nolan, Phone: (312) 364-8221  
e-mail: [cnolan@williamblair.com](mailto:cnolan@williamblair.com)  
Celeste Reed, Phone: (312)364-8358  
e-mail: [creed@williamblair.com](mailto:creed@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 the following: Offices and Ministries – Bank/Investments – Stock Donation Procedures (under “Links”) – Irrevocable Stock/Bond Power form.
3. **IN-PERSON DELIVERY** – 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.**

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## MUTUAL FUND DONATION

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### All Mutual Fund Donations

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

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

In most cases William Blair & Company will be able to expedite the time it takes to process gifts of mutual fund shares by creating an account to process the gift. Please call Matt Blume at William Blair & Company at (312) 364-8395 or Greg Salm, Bank Manager.

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

***Thank you for your donation.***



**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, Archdiocesan Bank Manager at (312) 534-5399.

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

**ELECTRONICALLY**  
 (Broker to Broker)

By Registered Mail

By Hand Delivery

**From:** (Please Print)

**Donation Date:** \_\_\_\_\_

<b>Donor Name(s):</b>
<b>Address:</b>
<b>City, State, Zip:</b>
<b>Telephone:</b>
<b>Email Address:</b>

Please accept our gift of \_\_\_\_\_ shares of \_\_\_\_\_  
 (# of shares) (Name of Security)

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

<b>Parish, School or Agency:</b>
<b>Address:</b>
<b>City, State, Zip:</b>
<b>Other Information:</b>

*(Please attach a separate list for gifts with multiple stocks and/or beneficiaries).*

**Send this form via one method listed below:**

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

***Thank you for your donation.***