



# ARCHDIOCESE OF CHICAGO

Department of Finance  
Parish Operations



Post Office Box 1979  
Chicago, Illinois 60690-1979

November 1, 2010

## **A HELPFUL REMINDER: 'TIS THE STOCK DONATION SEASON**

### **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 Parish Operations - Stock Donation Rep. by phone: 312/534-5399, fax: 312/534-5267 or via e-mail: [gdsalm@archchicago.org](mailto:gdsalm@archchicago.org).

**Complete and send the Stock Donation Letter of Intention.**

**ALL STOCK DONATIONS MUST BE ACCOMPANIED BY** a stock donation letter of intention. The Letter of Intention may be attached to these instructions. If not, it is available via:

- Website [www.archchicago.org](http://www.archchicago.org) - Click on Departments - then Parish Operations - and click on Letter of Intention.
- Phone Request - 312/534-5399 (Parish Operations - Stock Donation Rep) - we can send the form via e-mail, regular mail or fax.

Complete form and send to Parish Operations - Attn: Stock Donation via:

Fax: 312/534-5267

U.S. mail: Archdiocese of Chicago, 835 N. Rush St., Chicago, IL 60611

E-mail: [gdsalm@archchicago.org](mailto:gdsalm@archchicago.org).

### **STOCK CERTIFICATE(S) DONATION:**

#### **Transfer the Stock/Securities**

You can transfer securities three (3) ways: Electronically, by Registered Mail, or Hand Deliver in person.

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, Candy Plencner, Phone: 312/364-8169,  
Fax: 312/577-0658 or e-mail: [cplencner@williamblair.com](mailto:cplencner@williamblair.com)

**Reminder: Fax, E-mail or Mail the completed Letter of Intention to Parish Operations-Stock Donation at the Archdiocese of Chicago (Address is listed above).**

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. Via Registered Mail (2 separate envelopes) to: Archdiocese of Chicago - Parish Operations - Stock Donations - 835 N. Rush St., Chicago, IL 60611.
  - An irrevocable stock bond power form is available on our website: [www.archchicago.org](http://www.archchicago.org) - click on Departments - then Parish Operations - scroll down to Archdiocesan Banking - click on irrevocable stock bond power form. Or call us at 312/534-5399 - we can fax or e-mail the form to you.
3. **HAND DELIVER** - to deliver the securities (stock certificate) in person:
- **DO NOT SIGN** the stock certificate(s).
  - Contact Parish Operations - Stock Transfer Representative 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 DONATIONS

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ALL mutual fund donations –

Due to various methods of transactions required to obtain funds from mutual fund accounts - Parish Operations recommends the Parish, School, Agency or Donor to contact Parish Operations Stock Donation Representative at 312/534-5399.

Parish Operations 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.*