



Diocese of Allentown Stock Donation Instructions

Gifts of stock may be made via electronic transfer or you may deposit certificates at any Wells Fargo Advisors office. The Diocese of Allentown maintains a brokerage account with Wells Fargo Advisors for the purpose of processing stock transfers to the Diocese for the benefit of the Diocese of Allentown or any of its parishes, schools or agencies.

PLEASE PROVIDE ALL INFORMATION REQUESTED:

NOTICE OF STOCK DONATION:

Name: _____ Parish: St. Elizabeth, 612 Fullerton, Whitehall, PA

Address: _____
(Street) (City) (State) (Zip)

Phone: _____ (work) _____ (home)

Name of stock and shares donated: _____

(Signature)

(Date)

Please apply my gift towards the following campaign:

____ St. Elizabeth Parish

____ St. Elizabeth Regional School

____ St. Elizabeth Capital Improvements

____ Other _____

Please send copies of Pages 1 and 2 to:
[Michele Mullikin - mmullikin@allentowndioocese.org](mailto:mmullikin@allentowndioocese.org)
P.O. Box F
Allentown, PA 18105-1538
Phone: 610-871-5200 ext. 2282 Fax: 610-871-5211

TRANSFER INSTRUCTIONS

A. PREFERRED METHOD - ELECTRONIC TRANSFER BY BROKER

Please submit this form to your Transfer Agent or broker and a copy to the Diocese. (See below)

To: _____
(Broker's Name & Company)

Please transfer _____ shares of _____ stock from my
Account _____ to:

**Wells Fargo Advisors
c/o First Clearing LLC
1250 Broadcasting Road
Wyomissing, PA 19610
Robert Wert – 610-378-3081
Diocese of Allentown
ACCOUNT # 2479-7144
DTC # 0141**

I / we hereby authorize the above stock transfer:

(Signature) (Date) (Signature) (Date)

B: DIRECT DONATION OF CERTIFICATE

1. If certificate is titled in the name of the donor provide the following:
 - a. **UNSIGNED** stock certificate.
 - b. Signed Stock Power (Form available from Development Office).
 - c. Signed Stock Donation Notice (Page 1 above) or Letter of Intent.
 - d. Send Stock Power & Unsigned Certificate in **SEPARATE** envelopes by registered mail (or deliver) to the Diocese.
2. If certificate is titled in the name of the Diocese:
 - a. Send by registered mail (or deliver) to the Diocese
Questions? Please call (610) 871-5200 X 282.

**TO INSURE THAT YOUR GIFT IS PROPERLY IDENTIFIED, PLEASE SEND COPIES OF
PAGES 1 AND 2 BY EMAIL, MAIL OR FAX TO:**

[Michele Mullikin - mmullikin@allentowndiocese.org](mailto:mmullikin@allentowndiocese.org)

P.O. Box F, Allentown, PA 18105-1538

Phone: 610-871-5200 ext. 2282 Fax: 610-871-5211