

ARCHDIOCESE OF CHICAGO

Financial Operations
Archdiocesan Bank - Stock Donation



835 N. Rush Street
Chicago, Illinois 60611
Ph: (312) 534-5399
Fax: (312) 534-5272

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 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 – Click on the following: Departments – 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).

SECURITIES & STOCK CERTIFICATE(S) DONATION

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:
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, 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:
 - Erica Hullinger, Phone: (312) 364-8373, Fax: (312) 236-6223 or e-mail: ehullinger@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: Departments - 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.

MUTUAL FUND DONATION

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.

ARCHDIOCESE OF CHICAGO

Department of Finance
Post Office Box 1979
Chicago, Illinois 60690-1979



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Chicago, IL 60611
Phone (312) 534-5399
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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: _____

Donor Name(s):
Address:
City, State, Zip:
Telephone:
Email Address:

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:

Parish, School or Agency:
Address:
City, State, Zip:
Other Information:

(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.