



Stock Donation Instructions

Thank you very much for supporting the mission of the Diocese of Joliet with a gift of appreciated stock. To complete your donation, please follow the steps outlined below. If further assistance is required, please contact the Development Office at (815) 838-8515 or development@dioceseofjoliet.org.

Complete and Submit the Stock Donation Letter of Intention (Page 2)

Please complete the **Stock Donation Letter of Intention** – Page 2 of this document for proper processing and identification of the donor.

Once complete, please **email** the **Letter of Intention** to the Diocese of Joliet Development Office development@dioceseofjoliet.org. Additionally, if the donation is intended for a parish, school or other organization, please send a copy to that organization.

Without a completed Letter of Intention, we will not know where to send the proceeds of the donation.

You may transfer stock electronically.

Contact your broker with instructions to make a transfer from your account to the Diocese of Joliet account.

Receiving Firm Name:	Equitable Advisors LLC
Diocesan Broker Name:	Stofan Agazzi Investments LLC, Irene Celander
Address:	2801 Black Rd # 101, Joliet, IL 60435-2702
Phone:	(815) 729-1266
Registration of Account:	Roman Catholic Diocese of Joliet
DTC:	0075
Diocesan Account:	4343-0770

Payment Processing and Acknowledgement of Donation

The Diocese of Joliet acts as a clearing house for donations of stock. When securities are donated, the Diocese of Joliet's brokerage firm (Stofan, Agazzi & Co.) liquidates the securities and sends the proceeds to the Diocese along with a trade confirmation form. The Diocese forwards the proceeds to the parish, school, or other institution as directed by the information provided in the **Stock Donation Letter of Intention**. Acknowledgement of the gift will be sent to the donor by the final gift recipient, not by the Diocese of Joliet.



STOCK DONATION LETTER OF INTENTION

Please complete this form for all stock donations and forward to the diocese via email to development@dioceseofjoliet.org.
You may also submit this form by mail to:

Roman Catholic Diocese of Joliet
Blanchette Catholic Center
16555 Weber Road
Crest Hill, IL 60403
Attn: Development Office

AND PLEASE ALSO FORWARD TO:

Parish, School or other Institution for which the donation is intended (if other than the Diocese of Joliet).

Donor Information:

Donor Name: _____ Date: _____

Donor Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone Number: _____

Donor Parish or School: _____

Donation Information:

Name of Stock: _____ Number of Shares: _____

Intention of Gift (please check one):

_____ Catholic Ministries Annual Appeal (Diocese of Joliet)

_____ Catholic Education Foundation (Diocese of Joliet)

_____ Parish (Specify below)

_____ School (Specify below)

_____ Other Institution (Specify below)

If Parish, School or other Institution please specify:

Name of Parish, School or other Institution: _____

Address: _____

City: _____ State: _____ Zip: _____

Donor Broker: _____

Donor Signature(s): _____ Date: _____

Donor Signature(s): _____ Date: _____