



# 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:

- BISHOP'S ANNUAL APPEAL
- OTHER \_\_\_\_\_

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Please send copies of Pages 1 and 2 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

**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)

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**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)**

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