

Foundation Broker: Portsmouth Financial Services
Account Manager: Walter J. Bankovitch
Broker Address: 250 Montgomery St., Ste 200, San Francisco, CA 94104
Broker Phone #: 415-543-8500
DTC #: 0443
Diocesan Acc t#: 6PH105792
Diocesan Tax ID #: 94-2734503

*Once the stock is transferred:
Please fill out the following and send by email, fax, or letter to the Diocese (information below).*

Date of Transfer: _____
Donor Name: _____
Address: _____
City: _____
State: _____ ZIP: _____
Phone: _____
Email: _____
Name of Stock: _____
Shares: _____ Symbol: _____
Pledge Payment (Yes/No)? _____

This stock gift is for the benefit of:

A letter of acknowledgement will be sent by the Diocese of San Jose

Contact Information:
Department of Financial Services
Diocese of San Jose
1150 North First Street, Suite 100
San Jose, CA 95112
Phone: 408-983-0234 FAX: 408-983-0296 Email: russell@dsj.org

Please also cc: St. Mary of the Immaculate Conception
 Attn.: Teri Shepherd Tucci
 219 Bean Avenue
 Los Gatos, CA 95030

Ph: 408-354-3726 x137 Fx: 408-354-9302 Email: tstucci@stmaryslg.org

* If you wish to make a stock donation of physical stock certificates or utilizing a transfer agent (such as Computershare), then contact StephenRussell (408-983-0234, russell@dsj.org) in the Department of Financial Services for instructions.