Stock Transfer Instructions

Gifts of stock may be made to the Diocese of Rochester. The Diocese maintains a brokerage account with Merrill Lynch for the purpose of processing such transfers. To make a gift of stock, please complete this form & forward it to your Broker/Agent and to the Diocese of Rochester Stewardship Office.

NOTICE OF STOCK GIFT (via electronic transfer)

To: _________________________________________ (name of Donor’s Broker/Agent)
Please transfer _________ shares of ______________________________ to:

MERRILL LYNCH
Attn: Ryan Joslyn
1241 Pittsford-Victor Road
Pittsford, NY 14534
Phone: 585-899-2740
Fax: 585-672-4079

For: The Diocese of Rochester
Account # 810-02343
DTC Number 8862

Signature ___________________________________________ Date _______________
Print Name ____________________________________________________________________________
Address ______________________________________________________________________________
City: ________________________________________________________ Zip: _____________________
Phone: ________________________________ Parish: ________________________________________
Donor’s Agent Company: _______________________________________ Phone: __________________
Donor’s Account Number __________________________________________

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Please stipulate the purpose of the gift: ______________________________________________________

Stewardship & Communications Office
Diocese of Rochester, 1150 Buffalo Road, Rochester, NY 14624
585-328-3210 Fax: 585-328-3149 E-Mail: Stewardship@dor.org

NOTE: If the stock is held in certificate form, and registered in your name(s), please contact Colleen Brade at the Diocese for instructions at 585-328-3228 ext. 1326 or colleen.brade@dor.org.