

Stock Transfers to The Diocese of San Jose

To make a broker-to-broker transfer, your broker will require the following written instructions:

DSJ Broker Portsmouth Financial Services	Account Manager Walter J. Bankovitch	Trust Company 625 Market Street Seventh Floor San Francisco, CA 94105
DSJ DTC Participant # 0443	DTC Internal Account # 6PH105792	Foundation taxpayer ID# 94-2734503

Once the stock is transferred: *Please send written instructions to the Diocese of San Jose* (you may fill out and send in the following by fax, letter or email)

Date of Transfer _____ Donor Name _____

Address _____ City _____ State _____ Zip _____

Phone _____

Name of Stock _____ Number of Shares _____ Symbol _____

Any Stock Restrictions? _____

Pledge Payment (Yes/No) _____

This stock gift is for the benefit of (Parish Name, Case Element or Where Needed Most)

Contact Information

Diocese of San Jose
1150 North First Street, Suite 100
San Jose, CA 95112-4966
Phone (408) 983.0100 FAX (408) 983-0295

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

For further information about donation of stock, cash, securities or other assets, contact the following:

Department of Financial Services
Diocese of San Jose
1150 North First Street, Suite 100
San Jose, CA 95112-4966
Phone (408) 983.0100 FAX (408) 983-0295