

Stock Transfers to the Diocese of San Jose, its parishes, schools, and ministries

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

Foundation Broker: Portsmouth Financial Services
Account Manager: Walter J. Bankovitch
Broker Address: 250 Montgomery Street, Suite 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.

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

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