

DTC (Depository Trust Company) Transfer Instructions
Donor to Complete Before Shares/Securities are Sent

Instructions to Donor:

1. Please give the original copy of this authorization (**page 2**) to the delivering broker.
2. Please email or mail a copy (or picture thereof) to the diocese at schuman@diocesekcsj.org or Stewardship & Development, Attn: Theresa Schuman, Diocese of Kansas City-St. Joseph, PO Box 419037, KCMO 64141-6037.
3. Please copy Linda Maclean at linda.maclean@wellsfargo.com.

FAQs for Completing this Form

- We need a copy of this document (page 2) to understand how to allocate your gift and what to watch for. **Even if your delivering broker has you fill out a separate (similar) form, it is vital that you return this completed form (page 2) first and foremost.**
 - This form should not be substituted by a broker-provided form.
 - **If you are unsure of the shares being sent, and only know that you wish for \$xxx amount of funds to be sent, consult with your delivering broker to determine what is being sent before sending any shares, or completing this form.**
 - Do not send cash via this mode of giving.
 - Please note that our agent at Wells Fargo is unable to confirm the status of gifts, or speak with donors about our account. If there are ever any questions, please contact Theresa Schuman at either schuman@diocesekcsj.org or 816-714-2396.
 - **Failure to not share this form (page 2) with the diocese contact can result in a gift not being allocated or acknowledged for tax purposes.**
-

DTC (Depository Trust Company) Transfer form – Gift of Stock/Securities
Donor to Complete Before Shares/Securities are Sent

Please gift the following *[if unsure of the specific shares, consult your delivering broker]*

<u># of shares</u>	<u>Security Name</u>	<u>Symbol (optional)</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

From: My Account Number _____ **at** _____
(delivering firm)

To: Catholic Diocese of Kansas City-St. Joseph
 Wells Fargo Advisors, LLC
 DTC # 0141
 Account # 5328-3701
 Tax ID # 44-0546494

Please designate my gift for [provide specifics] as follows [full name, address, supported campaign/ministry, etc.]:

- The following parish, school, and/or campaign:

- The Diocese of Kansas City-St. Joseph for benefit of:

Date: _____

Date: _____

Printed Name (Donor) and Address

Printed Name (Donor) and Address

Send this form to the Diocese Contact:
 Theresa Schuman
 Diocese of Kansas City – St. Joseph
 Office of Stewardship & Development
 PO Box 419037, KCMO 64141-6037
schuman@diocesekcsj.org

**Please note, due to 3rd party privacy, Wells Fargo is unable to speak with you regarding your donation. For questions, please contact Theresa Schuman [left]*