

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](mailto: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](mailto: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](mailto: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.**
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**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](mailto:schuman@diocesekcsj.org)

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