



## Gifts of Stock

Thank you for your generous gift of stock. The instructions below have been published by the Diocese of Evansville's Finance Office to complete your transaction in the most timely and efficient manner.

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1. Please provide the below information to your broker or financial advisor:

Donor's Name: \_\_\_\_\_

Stock Proceeds for benefit of: \_\_\_\_\_  
(your parish, city)

Account Name: Catholic Diocese Parish Account  
Tax ID#: 35-1044322  
DTC#: 0547  
Account Number: 4224-6387  
Mailing Address: RW Baird  
110 Main Street  
Evansville, IN 47708

Phone Number: \_\_\_\_\_  
812-426-1481  
Contact Name: Dianne Daniel

2. Please ask your broker to provide you with the confirmation number received once the transfer is complete. In turn, provide this confirmation number to the Finance Office:

Contact Name: Dean Happe, Diocesan Finance Officer  
Phone Number: 812-424-5536  
E-Mail Address: [dhappe@evdio.org](mailto:dhappe@evdio.org)

3. You will receive a letter for your tax purposes at the end of the quarter in which it was received. Please retain for your records.

Please Note: To be recorded as a current calendar year donation, the securities must be received by the firm by December 31<sup>st</sup>. A gift transferred by the donor's broker before December 31<sup>st</sup>, but received by the firm in January will not qualify as a current calendar year donation. On occasion, transfers are not completed within the same day due to unforeseen circumstances, particularly at year's end.