

# LETTER OF INTENT | ELECTRONIC TRANSFER OF STOCK

Please complete this form for donations of stock.

For further assistance, please contact the Donor Services Team at (214) 528-2540 or [development@cathdal.org](mailto:development@cathdal.org).

Please accept my donation to the *Diocese of Dallas* of \_\_\_\_\_ (number of shares) of \_\_\_\_\_ (company) stocks.

*Please provide the following information to your Stockbroker:*

- Account Name: **Catholic Diocese of Dallas**
- Interactive Brokers Acct. # **542-04209** | DTC # **8862**
- Brokerage: **Merrill Lynch**
- Contact: **Lisa McAdam** | Phone: **(214) 969-2330**

Please e-mail **Barry Hanner, Director of Financial Services** for the Diocese of Dallas, at [bhanner@cathdal.org](mailto:bhanner@cathdal.org) when the transfer is initiated so the Diocese of Dallas' broker can be alerted to accept the stocks and the diocese is able to acknowledge your gift properly and appropriately credit your gift.

Donor Name: \_\_\_\_\_

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City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Parish Name: \_\_\_\_\_ City: \_\_\_\_\_

Brokerage Company: \_\_\_\_\_

Brokerage Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Comments/Special Instructions: \_\_\_\_\_

## Credit my donation to the Catholic Diocese of Dallas for the benefit of:

**Parish:** \_\_\_\_\_

Endowment       Capital Campaign       Offertory       Unrestricted

**Catholic School:** \_\_\_\_\_

**Diocesan Education Endowment Trust**       **Bishop's Invitational Golf Tournament**

**Holy Trinity Seminary**       **Redemptorist Mater Seminary**       **Diocesan Seminary Burse Endowment**

**Clergy Formation Appeal**       **Priest Pension Plans**       **Unrestricted**

**Other:** \_\_\_\_\_

All donations should be made payable to the Catholic Diocese of Dallas. All payments are contributions to the Catholic Diocese of Dallas, a Texas non-profit corporation that is tax-exempt under section 501[c][3] of the U.S. Internal Revenue Code and a public charity under sections 170[b][1][A][vi] and 509[a][1] of the Code. Contributions are deductible to the maximum extent permitted by section 170[b] of the Code. EIN: 75-0800637.



Please complete the form above and return to:

3725 Blackburn St., PO Box 190507, Dallas, TX 75219

[development@cathdal.org](mailto:development@cathdal.org) | Phone: (214) 528-2540