



**ARCHDIOCESE
of MILWAUKEE**

3501 South Lake Drive
PO Box 07912
Milwaukee, WI 53207-0912

(414) 769-3300
Tax ID#: 39-0807221
Donor ID#: _____

STOCK / MUTUAL FUND TRANSFER INSTRUCTIONS—ARCHDIOCESE / CATHOLIC STEWARDSHIP APPEAL (CSA)

STEP ONE: COMPLETE DONOR INFORMATION

To ensure the intent of your gift, please complete the following information:

Donor Name: _____
(Unless Anonymous)

Donor Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Parish: _____ City: _____

Number of Shares: _____ Name of Stock / Fund: _____

Firm that currently holds Stock / Fund Shares: _____

Intention of Gift (Check one):

Archdiocese General Fund Catholic Stewardship Appeal Combined Collections

Specific purpose (if any): _____

Please transfer the above stated stock / mutual fund as a charitable contribution to the Archdiocese of Milwaukee as listed below:

Donor Signature(s): _____ Date: _____

_____ Date: _____

STEP TWO: PLEASE SUBMIT A COPY VIA FAX (414) 769-3396, EMAIL PFUNDSTEINB@ARCHMIL.ORG OR MAIL TO THE ARCHDIOCESE ADDRESS TO ENSURE THAT THE GIFT IS PROPERLY IDENTIFIED.

STEP THREE: PLEASE SUBMIT THIS FORM TO YOUR TRANSFER AGENT (BROKER):

Broker Number (DTC): 0547
Brokerage Firm: Robert W. Baird & Co
777 East Wisconsin Avenue
Milwaukee, Wisconsin 53202
Phone: (414) 765-3609
Account Names: | Archdiocese of Milwaukee | **OR** | Catholic Stewardship Appeal |
| and Combined Collections |
Account Numbers: | 1179-9500 | **OR** | 1997-4125 |

Comments: Please reference the donor's name or donee organization for tax recognition purposes.