

## **Stock Transfers to the Diocese of San Jose, its parishes, schools, and ministries**

To make a broker-to-broker transfer\*, your broker will require the following written instructions:

Foundation Broker: Portsmouth Financial Services  
Account Manager: Walter J. Bankovitch  
Broker Address: 250 Montgomery Street, Suite 200, San Francisco, CA 94104  
Broker Phone #: 415-543-8500  
DTC #: 0443  
Diocesan Acc t#: 6PH105792  
Diocesan Tax ID #: 94-2734503

### **Once the stock is transferred:**

Please fill out the following and send by email, fax, or letter to the Diocese.

Date of Transfer: \_\_\_\_\_  
Donor Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Name of Stock: \_\_\_\_\_ # Shares: \_\_\_\_\_ Symbol: \_\_\_\_\_  
Pledge Payment (Yes/No)? \_\_\_\_\_  
This stock gift is for the benefit of:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### **A letter of acknowledgement will be sent by the Diocese of San Jose**

Contact Information:  
Department of Financial Services  
Diocese of San Jose  
1150 North First Street, Suite 100  
San Jose, CA 95112  
Phone: 408-983-0234 FAX: 408-983-0296  
Email: [russell@dsj.org](mailto:russell@dsj.org)

\* If you wish to make a stock donation of physical stock certificates or utilizing a transfer agent (such as Computershare), then contact Stephen Russell (408-983-0234, [russell@dsj.org](mailto:russell@dsj.org)) in the Department of Financial Services for instructions.