



## **Diocese of Altoona-Johnstown** Guide for Processing Gifts of Stock

Thank you for your interest in sharing a portion of your God-given resources for the spiritual betterment of the Kingdom already present in our midst. Know that your stewardship is deeply appreciated as we, in turn, become stewards of your generosity.

The following procedures apply to electronic transfers for charitable gifts of stock to the Diocese of Altoona-Johnstown.

1. Submit your stock transfer request in writing to your broker.
2. Share the following instructions for electronic (DTC) transfers with your broker.
3. Please communicate to the Diocesan Development Office the stock name, number of shares, and the date you requested that the transfer is to be made.

Contacts: Mr. Chris Ringkamp, Director of Development  
(814) 695-5577, ext. 2686, or ringkamp@dioceseaj.org

Mrs. Cathy McKee, Development Administrative Assistant  
(814) 695-5577, ext. 2679, or cmckee@dioceseaj.org

4. Please specify your preference, if any, of how the Diocese should use your gift (i.e. Annual Catholic Appeal, a parish, a school, a planned gift, for an endowment with the Independent Foundation, or a particular program or ministry of interest).

### **ELECTRONIC SECURITIES TRANSFER PROCEDURES**

The Diocese's account for DTC transfers is held by:

Stifel, Nicolaus & Company, Inc.                      Toll-Free: 800-533-6401  
180 Charlotte Drive, Suite 100                      Fax:                      814-944-8416  
Altoona, PA 16601

Account Officer:                      Karen Corrado-Knote, CFP, Vice President/Investments  
Transfer Details:                      Stifel, Nicolaus & Company, Inc.; DTC #0793  
Account Name:                      The Diocese of Altoona-Johnstown  
Account Number:                      5600-9287

Diocese of Altoona-Johnstown Tax I.D. (FEIN): 23-1533889

For a gift of mutual fund shares, please contact your mutual fund company for instructions on how shares may be issued in the name of The Diocese of Altoona-Johnstown.