

Instructions for Donating Stock

I. The donor notifies their broker with the following information:

- a. Name of stock
- b. Number of shares they wish to donate
- c. Archdiocese's broker information which is:

~ Broker: The Wealth Strategies Group
7761 Shaffer Parkway, #210
Littleton, CO 80127
Contact: Lori Green – 303-933-2107

~ DTC #0075

~ Client Account Number: 1009-7348

~ Client Account Name: Archdiocese of Denver

II. The donor must notify the Archdiocese of Denver (attention: Caroline Rose), with the following information either by letter or e-mail:

- a. Their name, address and telephone number
- b. The name of the stock
- c. The number of shares they are donating
- d. What entity/organization they wish to benefit from the donation

(The letter should state that they are “*donating xxx shares of stock to the Archdiocese of Denver for the benefit of xxxxxx”)*

It is very important that the donor notify the Archdiocese as the information received from the broker does not provide the information noted above.

III. Contact information for the Archdiocese of Denver is as follows:

- a. Caroline Rose
Archdiocese of Denver
1300 South Steele Street
Denver, CO 80210
E-mail: caroline.rose@archden.org

If you have questions, please call Caroline Rose at 303-715-3258