



# DIOCESE OF GRAND RAPIDS

## GIFTS OF STOCK

Thank you for your generous gift of stock. The instructions below have been published by the Diocese of Grand Rapids Finance Office to complete your transaction in the most timely and efficient manner.

1. Please provide the below information to your broker or financial advisor:

Donor name: \_\_\_\_\_

Your parish name, city: \_\_\_\_\_

Broker Name: Raymond James

Broker Contact: John Osbourne (616) 974-3003, [john.osbourne@raymondjames.com](mailto:john.osbourne@raymondjames.com)

Account name: Diocese of Grand Rapids

DTC #: 0725

Account number: 35185153

EIN: 38-1368746

2. Please ask your broker to provide the confirmation number and information about the transfer (# of shares, company name, name of client) to the Diocese Finance Office:

Contact Name: Charles Fust, comptroller

Phone Number: (616) 475-1253

Email Address: [cfust@grdiocese.org](mailto:cfust@grdiocese.org)

3. Please contact the Diocese Finance Office with the intended purpose of the gift (e.g., Catholic Service Appeal, for the benefit of a parish or school, etc.).
4. The donor will receive a letter for tax purposes upon receipt of the securities. Please retain for your records.

*Please note: To be recorded as a current calendar year donation, the securities must be received by the diocese by December 31st. A gift transferred by the donor's broker before December 31st but received in January will not qualify as a current calendar year donation. On occasion, transfers are not completed within the same day due to unforeseen circumstances, particularly at year's end.*