



*"Where one alone may be overcome, two together can resist.  
A three-ply cord is not easily broken."*

## Stock and Mutual Fund Transfer Instructions

The Donor contacts their stockbroker/advisor/bank. The originating broker may need a form(s) to complete the transfer.

The Donor informs their stockbroker/advisor/bank that they wish to transfer stock/funds to the Diocese of La Crosse: For "Parish Name and City" for the Diocesan Annual Appeal.

- The Donor should inform the stockbroker/advisor/bank of the contribution dollar amount or the number of shares and frequency (e.g., one-time gift, monthly, quarterly, annual, etc.)
- Inform the stockbroker/advisor/bank which donor account will be used to transfer the gift amount from (mutual fund name, stock name, money market, etc.)

Note: The amount can be listed in total dollars or the number of shares

Provide the broker/advisor/bank with the following information for their office to process the electronic funds' transfer properly:

**Receiving Account:** 26 12 89 93

**Receiving DTC:** 0547

**Receiving Name:** Diocese of La Crosse: Parish Name and City, Diocesan Annual Appeal

After instructing their broker/advisor/bank to initiate the transfer, the Donor should contact Lisa Newman at Baird as soon as possible to inform her of an incoming electronic transfer. Please do not wait to contact her. Once the transfer is initiated, it is essential to contact her as soon as possible.

Lisa Newman  
Vice President  
Baird Private Wealth Management  
Main 800-356-0520 or Direct 608-785-2880  
Email: [lnewman@rwbaird.com](mailto:lnewman@rwbaird.com)

Be sure to include the following:

**Sending:** Name of stockbroker/advisor/bank

**Sending:** Donor Name, Amount being transferred (number of shares or dollars, and the fund or company)

**Purpose:** The Diocese of La Crosse: Parish name and City, and the intent of the gift