



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 Inspired by the Spirit Campaign.

- 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, Inspired by the Spirit Campaign

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

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