



PLEASE DO NOT TRANSFER SECURITIES WITHOUT NOTIFYING THE DIOCESE OF ROCHESTER'S STEWARDSHIP OFFICE.

Gifts of stock and other securities may be made to the Diocese of Rochester. The Diocese maintains an account with **Tompkins Financial Advisors** for the purpose of processing such transfers. This form is designed for you to share with your Broker/Agent, and to notify the Diocese of Rochester's Stewardship Office of your transfer instructions.

Transfer Instructions

Please complete this form and forward it to your Broker/Agent. Please send a copy of this form to: **Colleen Brade, Office of Stewardship at colleen.brade@dor.org.**

NOTICE OF STOCK/SECURITIES GIFT (via electronic transfer)

To: _____ (name of Donor's Broker/Agent)

Please transfer _____ shares of _____ to:

Tompkins Financial Advisors
Attn: Conner Simonetti
99 Garnsey Road Suite 400
Pittsford, NY 14534

Office: 1-585-419-8305
Email: csimonetti@tompkinsfinancial.com

For: **The Diocese of Rochester**
Account # 18368201
DTC Number 2663

Signature _____ Date _____

Print Name _____

Address _____

City: _____ Zip: _____

Phone: _____ Parish: _____

Donor's Agent Company: _____ Phone: _____

Donor's Account Number: _____

Please stipulate the purpose of the gift: _____

Stewardship/CMA Office

Diocese of Rochester, 1150 Buffalo Road, Rochester, NY 14624
Phone: 585-328-3210 Fax: 585-328-3149 E-Mail: stewardship@dor.org

NOTE: If the stock is held in certificate form, and registered in your name(s), please contact Colleen Brade at the Diocese for instructions at 585-328-3228 ext. 1326 or colleen.brade@dor.org.