

**ROMAN CATHOLIC BISHOP OF WORCESTER
A CORPORATION SOLE**

STOCK TRANSFER INSTRUCTIONS

Gifts of stock may be made to the Diocese or any of its related entities. The Diocese of Worcester Maintains a brokerage account with Morgan Stanley Smith Barney for the purposes of processing stock transfers.

To transfer stock:

1. If the stock is held by a broker, provide your broker with the information shown in
2. Part I.
Your broker will inform you of its requirements to execute the transfer to the diocesan account.
3. If the stock is held by you and registered in your name(s) please contact the Diocese's receiving broker for delivery instructions:

**James B. Kenary, Jr.
Morgan Stanley Smith Barney
Tel: 1-800-451-4127 / 508-751-5612
Fax: 508-791-3945**

Part I: NOTICE OF STOCK GIFT TO BROKER

Please transfer _____ share of _____ Stock
from account number _____ to:

**Morgan Stanly Smith Barney
Attn: James B. Kenary, Jr.
100 Front Street
Worcester, MA 01608**

**For the account of: Roman Catholic Bishop of Worcester, A Corporation Sole
Account # 357-898575-054
DTC Number 0015**

(If delivery problems arise, please call James B. Kenary, Jr. at 1-800-451-412 / 508-751-5612)

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Part II: NOTICE OF STOCK GIFT TO THE DIOCESE OF WORCESTER

Name of individual(s) or entity making the gift: _____

Address: _____

Phone: _____

Parish: _____

Name and quantity of stock being transferred: _____

Donor's broker/agent: _____

Gift designation _____

Please complete and mail or fax Part II to us so that we may properly credit and acknowledge your gift.

If you have any further questions regarding the transfer of stock or other securities, please contact the Fiscal Affairs Office of the diocese at (508) 929-4335 or 508-929-4380 (fax).