

**Stock Transfer Instructions for Charitable Gifts to the  
Roman Catholic Bishop of Helena,  
a Montana Religious Corporation Sole**

1. *Before the transfer of stock is made, please notify Stewardship Services of the name and number of shares to be donated, along with your broker's name and brokerage firm.*

Diocese of Helena  
Contact: Sharon Witham, Director of Stewardship  
PO Box 1729 • 630 N Last Chance Gulch, Ste 2200  
Helena, MT 59624-1729  
switham@diocesehelena.org  
(406) 389-7062 – Helena area | (800) 584-8914 – Toll free in Montana. | (406) 442-5191 - Fax

2. *Provide the following information to your broker to transfer donated stock directly to the Roman Catholic Bishop of Helena, a Montana Religious Corporation Sole - Diocese of Helena's investment account.*

DA Davidson  
Attn: Account Transfer Dept.  
8 Third Street No.  
Great Falls, MT 59401  
Diocese of Helena Account #: 67033038 Roman Catholic Bishop of Helena, a Montana Religious Corporation Sole

**For DTC Eligible Securities**

Deliver to DTC Clearing #0361  
Roman Catholic Bishop of Helena #67033038

**For Mutual Funds call:** Mike Holland 406-442-9600

**For General Inquiries call:** Mike Holland 406-442-9600

3. *Provide a written statement to the Diocese of Helena – Stewardship Services explaining the purpose for which the gift of stock is to be used. For your convenience, you may use the form that accompanies these instructions, or you may simply send us a letter.*

We will send you an acknowledgement after your stock gift is received. For IRS tax return purposes, the date of the gift is the date that shares are received in the Diocese of Helena's account. The Roman Catholic Bishop of Helena is a 501(c)(3) Montana nonprofit corporation and our Tax ID # is 81-0231797.

**Thank You Very Much for Your Support!**



# Notification of Stock Gift to the Roman Catholic Bishop of Helena

Upon transfer of the gifted stock, please complete and send (fax, email, regular mail) the following information to the Diocese of Helena:

Donor Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Name of Stock: \_\_\_\_\_

Date Transferred: \_\_\_\_\_

Your Brokerage Handling Stock Transfer: \_\_\_\_\_

Purpose of Gift: "for the benefit of..." \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

*Please return to:*

**Diocese of Helena**

PO Box 1729 • 630 N Last Chance Gulch, Ste 2200

Helena, MT 59624-1729

switham@diocesehelena.org

*Questions?*

Contact Sharon Witham, Director of Stewardship, at (406) 389-7062 or email at

switham@diocesehelena.org.

*Thank you!*