

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 Part I. Your broker will inform you of its requirements to execute the transfer to the diocesan account.
2. 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

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PART I: NOTICE OF STOCK GIFT TO BROKER

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_

Stock from account number \_\_\_\_\_ to:

Morgan Stanley 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  
Acct. No. 357-898575-066  
DTC Number 0015

(If delivery problems arise, please call James B. Kenary, Jr. at 1-800-451-4127 / 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) 929-4344 (voice communications) or (508) 929-4380 (fax).