



## STOCK TRANSFER INSTRUCTIONS TO THE DIOCESE OF SAN JOSE

### Step 1: Please provide your contact information:

First and Last Name: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_ Daytime Phone Number: \_\_\_\_\_

### Step 2: Donation Specification: (Please check where you want your donation to go)

- Scholarship Endowment Fund                       Direct Tuition Assistance  
 Maintenance & Facilities Endowment Fund       Other (i.e., Library, Technology, etc.)  
 Our Faith, Our Community, Our Future Debt Reduction Campaign

### Step 3: Stock Information:

Name of stock: \_\_\_\_\_  
Number of stock shares to be transferred: \_\_\_\_\_  
Stock designated to Holy Family School

### Step 4: Information for your Broker: (Be sure to give them a copy of this form)

**Diocesan Broker:**  
**Account Manager:**  
**Broker Address:**

Portsmouth Financial Services  
Walter J. Bankovitch  
Bayside Plaza  
188 The Embarcadero  
San Francisco, CA 94105-1298  
0443  
6PH105792  
94-2734503  
(415) 543-8500

**Diocesan DTC#:**  
**Diocesan Account Number at Portsmouth Financial Services:**  
**Diocesan Taxpayer ID#**  
**Portsmouth Financial Services Phone:**

**Step 5:** Notify Holy Family Development Office when transfer order was given to stockbroker.

**Step 6:** Holy Family Development Office will forward letter of notification to Diocesan Office, with a copy to the donor.

**Step 7:** Transfer complete and funds received. At this point, you will receive a formal letter of acknowledgement from the Holy Family Development Office. Thank you.

### For further information, or questions about donations of stock, contact:

Carolyn Canete  
Development Office  
Holy Family School  
4850 Pearl Ave.  
San Jose, CA 95136  
FAX: (408) 978-0290  
E-mail: carolyn.canete@hfsj.org