



**Diocese of Altoona-Johnstown**  
Charitable Gifts of Stock

Thank you for your interest in donating gifts of appreciated securities. In most circumstances, such gifts may be more beneficial than outright gifts of cash. Please consult your financial advisor to determine your specific benefits.

To make charitable gifts of stock to your parish or diocesan ministry within the Diocese of Altoona-Johnstown, please share this document with your broker.

1. Complete and sign any documents as required by your broker.
2. Communicate your contact information (stock name, number of shares, and date of the transfer and special restrictions) to the Diocese's Development Director to ensure that your gift is allocated to the specific parish, school or Diocesan ministry of your choice.

Heather Foor, Director of Stewardship and Development

Office: 814.695.5579

Direct: 814.317.2604

Email: [hfoor@dioceseaj.org](mailto:hfoor@dioceseaj.org)

3. The Diocesan Development office will promptly issue a gift substantiation letter as soon as our broker communicates the stock transfer details.

Stifel, Nicolaus & Company, Inc. Altoona PA administers the Diocese's account.

DTC No: 0793  
Account Number: VW16 5600-9287  
Name/Address: Stifel, Nicolaus & Company, Inc.  
180 Charlotte Drive, Suite 100  
Altoona, PA 16601  
Toll-Free: 1.800.533.6401  
Fax: 814.949.8234  
Account Name: The Diocese of Altoona-Johnstown  
2713 West Chestnut Avenue  
Altoona, PA 16601  
814.695.5579  
Tax EIN: 23-1533889

For a gift of mutual fund shares, please contact your mutual fund company for instructions on how shares may be issued in the name of the Diocese of Altoona-Johnstown.

Thank you for your continued support of the Diocese of Altoona-Johnstown.