



Growing Our Faith

Creating our Parish Ministry Center

Stock Transfers at St. Pius X

As a parish in the Roman Catholic Diocese of Albany, St. Pius X utilizes the associated brokerage account with the Diocese. By following the directions below, your gift to St. Pius will be efficiently transferred to our parish. Please know you may contact us at St. Pius to review the steps and answer your questions.

1. Contact your broker and indicate the value of the gift you would like to make.
2. Clearly state that you will be utilizing the Diocese brokerage account and that the transfer notes has to state that it is to be for St. Pius X. (This allows the Diocesan office to accurately redistribute funds accordingly.)
3. Your broker will need this transfer information:

Account name: Roman Catholic Diocese of Albany, New York

DELIVERY THROUGH A BROKERAGE ACCOUNT:

(DTC# - 8862)

Account # - 808-04115

4. The contact on the Diocesan account is Jennifer Nolan of the Nolan Group at Merrill Lynch. If your broker has questions, she can be reached at the number provided below.
5. If you have delivery of actual stock certificates, a phone call is needed to Jennifer Nolan at Merrill Lynch (phone number below).
6. If making a transfer of shares from a Mutual Fund, contact Merrill Lynch to advise that shares are being transferred. Specify the name of the fund, the number of shares and the symbol.
7. Please email or call Nancy Uruskyj at St. Pius to make her aware of any of these transactions.

IN ALL INSTANCES:

- ✓ **Indicate that St. Pius is to receive the proceeds from the sale of stock.**
- ✓ **Remember to specify the location of the parish and,**
- ✓ **Indicate the charitable purpose of the donation.**

EXAMPLE

“The proceeds of this sale should benefit St. Pius X Roman Catholic Church, located in Loudonville, New York, and is to be applied toward my campaign commitment.”

**ROMAN CATHOLIC
DIOCESE OF ALBANY
STEWARDSHIP OFFICE**

40 N. Main Ave
Albany, NY 12203
Tel: (518) 453-6680
Fax: (518) 453-8440
Email: stewardship@rcda.org

St. Pius X

Nancy Uruskyj
Business Manager
518-462-1336, ext 2024
nmu@nycap.rr.com

Merrill Lynch

Ms. Jennifer Nolan
(518) 462-8330
(518) 618-3177 (fax)
69 State Street Albany NY
12207