

The Diocese of New York and New Jersey is able to accept contributions of financial stock and other financial investment assets through our securities account.

To make a gift of financial assets, please inform the Diocesan Treasurer of the company stock/mutual fund you intend to transfer, the approximate value of your gift and the intended purpose of your gift.

Please email this information to the Diocesan Treasurer: Janet VanDuyn, jan@catprint.com, or call (585) 544-6644.

Follow the instructions below for the type of asset you are transferring.

Securities registered in book form/street name at a broker: Provide your brokerage with the following information:

- Diocesan broker name: National Financial Services LLC (dba Fidelity Investments)
- Diocesan DTC clearing number: #0226
- Diocesan account number: #Z49-953571
- Name on the Account:: Diocese of New York and New Jersey of the Orthodox Church in America

Gift date is the date of receipt in the Diocesan brokerage account.

Securities held as physical certificates in your name:

- Sign the backside of the stock certificate or an irrevocable stock power transferring ownership to the Diocese of New York and New Jersey.
- The signature on the stock power must be guaranteed by an eligible guarantor institution participating in a STAMP Medallion program approved by the Securities Transfer Association, Inc.
- Send the stock certificate(s) along with a transmittal letter by certified mail to the Diocese Treasurer: Janet VanDuyn, 26 Landsdowne Lane, Rochester NY 14618.
Gift date is the postmark date as mailed.

Mutual Funds: follow the instructions for securities in book form.