

Catholic Diocese of Kansas City – St. Joseph  
Gift of Securities  
DTC Transfer

Please gift \_\_\_\_\_ of \_\_\_\_\_  
Shares/Unit Security

From my Account Number \_\_\_\_\_ at \_\_\_\_\_  
Delivering Firm

To: Catholic Diocese of Kansas City – St. Joseph  
Wells Fargo Advisors, LLC  
Account #5328-3701  
DTC # 0141

For the benefit of: \_\_\_\_\_

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Contact: Linda Maclean  
WBS Regional Support Specialist

Margo A. Shepard, CFP, CIMA  
Senior Financial Advisor

Wells Fargo Advisors, LLC  
7500 College Blvd. Suite 200  
Overland Park, KS 66210

Margo Telephone: (913) 663-6054  
Linda Telephone: (913) 234-7704  
Team Fax: (913) 234-7718

[Margo.Shepard@wellsfargo.com](mailto:Margo.Shepard@wellsfargo.com)  
[Linda.Maclean@wellsfargo.com](mailto:Linda.Maclean@wellsfargo.com)

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Instructions to Donor:

1. Please give this original signed letter of authorization to the delivering firm
2. Please fax or mail a copy of this signed letter to (913) 234-7718 Attn: Linda Maclean so we can notify the above organization and track your gift.