# STOCK/SECURITIES DONATION NOTIFICATION FORM

**Thank you for your decision to make a gift of securities. Your support is very much appreciated.**
Please provide the information requested below to ensure your gift is properly applied.

Date: _____

**Donor(s)** Name: _____ (Spouse)_____

Salutation: ☐Mr. ☐Mr. & Mrs. ☐Ms. ☐Dr. ☐Dr. & Mrs. ☐Drs. Phone: _____

Donor's Address: _____

_____

I/We will be initiating the following transaction:

| # Shares | Name of Stock/Security | For the Benefit of (entity name) |
|---|---|---|
| | | |
| | | |
| | | |
| | | |

**Intention of Gift** (what the gift is to be utilized for. Please check as many as apply. If there is more than one area, please complete Special Instructions below):

☐ Catholic Ministry Appeal ☐ General ☐ Offertory ☐ Parish Capital Campaign

☐ Debt Reduction ☐ Other (please specify) _____

**Special Instructions** (i.e. desired distribution amount/percentage **OR** # shares per designation):

_____

_____

_____

**Broker to be used**: for Direct transfers (Broker to Broker, which is preferred) to the Diocese of St. Petersburg and all its entities, please use of any of the following authorized listed brokerages for time and cost efficiency:

___ Raymond James ☐ Colin Long ☐ Robert Carney

**Broker Other than above** (please specify): _____
Please be aware that additional time and steps may occur.

**NOTE: You will be sent a thank you letter verifying your donation after receiving confirmation that the stock(s)/security(ies) have been transferred to the Diocese. The letter will show the number of shares, name of stock(s)/security(ies) and the Diocesan entity benefitting. PLEASE NOTE: For tax purposes, the IRS requires donations to be valued as of the date of donation. You should consult your tax advisor or broker regarding this.**

**Mail** this form to: **Diocese of St. Petersburg**
***Attn: Campaign Processing Office***
P. O. Box 40200
St. Petersburg, FL 33743-0200

**or Scan** to: stock-iradonations@dosp.org