

## INSTRUCTIONS FOR THE TRANSFER OF SECURITIES TO THE DIOCESE OF ST. PETERSBURG

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The Campaign Processing Office will administer all diocesan donations and gifts in accordance with diocesan policy and procedures. All stock gifts/donations will be credited directly to the parish, school, or diocesan entity designated by the donor and in accordance with the donor's wishes.

We request that the donor provide notification of the number of shares and name/s of the securities being gifted, and how the gift should be applied. Notification should be sent to:

ATTN: Campaign Processing Office  
Diocese of St. Petersburg  
P.O. Box 40200  
St. Petersburg, FL 33743-0200

FOR DIRECT TRANSFERS (Broker to Broker) TO THE DIOCESE OF ST. PETERSBURG  
and for all diocesan entities, please use one of the following authorized brokerages:

### Account information for RAYMOND JAMES

**(Preferred)**

Contact person: Colin Long  
Phone: (727) 567-8893  
Email: [colin.long@raymondjames.com](mailto:colin.long@raymondjames.com)  
Address: 880 Carillon Parkway-32E  
St. Petersburg, FL 33716

Contact person: Robert Carney  
Phone: (813) 634-5536  
Email: [Robert.carney@raymondjames.com](mailto:Robert.carney@raymondjames.com)  
Address: 133 S. Pebble Beach Blvd. 1<sup>st</sup> Floor  
Sun City Center, FL 33573

DTC#: 0725  
DOSP Account#: 15485553

DTC#: 0725  
DOSP Account#: 10612844

[Carissa.aliaga-mbulo@raymondjames.com](mailto:Carissa.aliaga-mbulo@raymondjames.com)

### Account information for MORGAN STANLEY

Contact person: TBD  
Phone: (727) 344 1611 ext. 5338  
Email: [stock-iradonations@dosp.org](mailto:stock-iradonations@dosp.org)  
Address:

DTC#: 0015  
DOSP Account#: 506-124909-700