



ROMAN CATHOLIC DIOCESE OF
SAINT PETERSBURG
COURAGEOUSLY
Living the Gospel

STOCK/SECURITIES DONATION NOTIFICATION FORM

Complete this form to ensure the gift is properly applied; otherwise, we may be unable to identify your stock transaction. You must contact your broker/agent to initiate your transfer of securities.

Date: _____ Parish of Record: _____

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

Address: _____ Phone: _____
Email: _____

I/We will be initiating the following transaction(s):

Number of Shares	Name of Stock / Security Symbol	Name of Bank / Brokerage Firm

If you would like to donate more than five securities, please use extra sheets or compile a list and send the details by email to stock-iradonations@dosp.org

Total estimated value of donation: \$ _____ Estimated date of transfer of shares: _____

Intention of Gift (What the gift is to be utilized for. Please check as many as apply. Please indicate % allocations):

- % _____ Catholic Ministry Appeal / Attributed to _____ Parish.
- % _____ Parish Capital Campaign: _____ Parish.
- % _____ Parish: _____ to be used for: _____ (e.g.: Offertory, Unrestricted)
- % _____ School: _____ to be used for: _____
- % _____ General: Diocese of Saint Petersburg
- % _____ Other (please identify and include city/town.): _____

Special Instructions:

Broker to be used: For Direct Transfers (Broker to Broker) to the Diocese of Saint Petersburg and all its entities, please use the following authorized brokerage for time and cost efficiency:

Raymond James Colin Long Robert Carney

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. **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.

Please scan and send completed form to: stock-iradonations@dosp.org (Preferred) or mail to:
Diocese of Saint Petersburg, Attn: Gift Acceptance Office, P.O. Box 40200, St. Petersburg, FL 33743-0200