



ROMAN CATHOLIC DIOCESE OF
SAINT PETERSBURG

COURAGEOUSLY
Living the Gospel

INSTRUCTIONS FOR THE TRANSFER OF SECURITIES TO THE DIOCESE OF SAINT PETERSBURG

Thank you for kindly considering a stock donation to the Diocese of Saint Petersburg. The Gift Acceptance Office will securely process all stock gifts in accordance with diocesan procedures. All stock gifts will be credited directly to the parish, school, or diocesan entity designated by the donor and in accordance with the donor's wishes.

The Diocese of Saint Petersburg maintains a brokerage account with RAYMOND JAMES for the purpose of processing stock transfers to the Diocese for the benefit of the Diocese or any of its parishes, schools, or other diocesan entities. The Diocese cannot initiate stock transfers on your behalf. You must contact your broker directly.

Donors *must* complete the diocesan **Stock/Securities Donation Notification Form** to provide the Diocese with a notification of:

- the number of shares
- name/s of the securities being gifted
- and how the gift should be applied

Completed **STOCK/SECURITIES DONATION NOTIFICATION FORM.pdf** must be sent to:

stock-iradonations@dosp.org (Preferred)

Or it could be printed and mailed directly to:

Diocese of St. Petersburg, Inc.
ATTN: Gift Acceptance Office
P.O. Box 40200
St. Petersburg, FL 33743-0200

This form is designed for you to share with your Broker/Agent, and to notify the DIOCESE OF SAINT PETERSBURG of your transfer instructions. Submitting this form by email or mail helps:

- ✓ Accurately link your gift to your name and contact details
- ✓ Ensure your donation is received and processed without delay
- ✓ Attribute your gift to your preferred designation
- ✓ Confirm you receive an acknowledgment letter for your records

Please note, when a stock is received into the RAYMOND JAMES account and the Gift Acceptance Office does not have a copy of the related **Stock/Securities Donation Notification Form**, the proceeds from the sale of the shares will be held in an “uncleared status” in the diocesan account until the form is received. Without this form, there is no way to know for whom the stock belongs, and we will be unable to attribute your donation or issue an acknowledgment letter.

If you should have any questions or concerns, please do not hesitate to contact the Gift Acceptance Office at (727) 344-1611 or stock-iradonations@dosp.org



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FOR DIRECT TRANSFERS (Broker to Broker) TO THE DIOCESE OF SAINT PETERSBURG please use the following authorized brokerages for all diocesan entities including parishes, schools, and ministries.

Account information for RAYMOND JAMES

(Preferred)

Contact person: Colin Long

Phone: (727) 567-8893

Email: colin.long@raymondjames.com

Address: 880 Carillon Parkway-32E
St. Petersburg, FL 33716

DTC#: 0725

DOSP Account#: 15485553

Contact person: Robert Carney

Phone: (813) 634-5536

Email: Robert.carney@raymondjames.com

Address: 133 S. Pebble Beach Blvd. 1st
Floor, Sun City Center, FL 33573

DTC#: 0725

DOSP Account#: 10612844

Carissa.aliaga-mbulo@raymondjames.com

Please keep the following in mind when sending in stock donations:

- In addition to providing a copy of the **Stock/Securities Donation Notification Form** to your Broker/Agent and the Diocese of Saint Petersburg, it is recommended to send additional copies of the form to (1) our authorized contact person at Raymond James via email, and (2) to the Pastor or Business Manager of the designated recipient/parish or school to alert them of the pending donation.
- For allocations of gifts, please indicate % allocations to the entities you wish to designate.
- It may take several days after the donor has instructed their broker before the securities are transferred to Raymond James. It takes yet another three to four working days for the trade to settle and the proceeds of the sale to arrive in the Diocesan account. If there are no unusual circumstances and everything is in order, the securities are generally sold on the day of receipt or the next working day, at the then “current” market price (*not necessarily the market value on the date the transfer instructions were initiated by the donor*).
- After the sale, the proceeds of the stock are matched with the copy of the **Stock/Securities Donation Notification Form** provided to the Gift Acceptance Office and a check is disbursed to the designated parish, school or diocesan entity (*or, if requested, the parish/school can request the funds be deposited into their Diocesan Savings account*).

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- For tax purposes, the IRS requires donations to be valued as of the date of donation (*date the securities enter our diocesan account*). You should consult your tax advisor and/or broker regarding this matter.
- When your gift is processed, an acknowledgement that complies with IRS regulations will be sent.
- In accordance with IRS guidelines, the Diocese of Saint Petersburg does not provide a valuation of the donated stock but simply acknowledges receipt of “X” shares of “Y” company for purposes of “Z” on the date of receipt. The donor is responsible for determining the fair market value for their records. To receive accurate guidance, we recommend that donors work with their tax advisors to determine the value of their donation and how it fits into their overall tax planning.

If you should have any questions or concerns, please do not hesitate to contact the Gift Acceptance Office at (727) 344-1611 or stock-iradonations@dosp.org



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:
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