

# 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)
		Our Lady of Lourdes Catholic Parish

**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     Bob Hilton  
 Robert Carney     Morgan Stanley     Tony Pastore

**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 all three:**    [stock-iradonations@dosp.org](mailto:stock-iradonations@dosp.org)    [tanya@ourladydunedin.org](mailto:tanya@ourladydunedin.org)    [mlw@dosp.org](mailto:mlw@dosp.org)