

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

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
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

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 ☐ 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