



# Donating **Stock**

to the Diocese of Orlando  
for *your* **parish** or **school**

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The Diocese encourages gifts of stock via electronic transfer from your brokerage. It's the *fastest* and *easiest* way to give stock to benefit your parish or school!

Just follow these two easy steps:

1. Write or phone your broker authorizing them to transfer X number of "XYZ Security" *in kind* to our Fidelity Investments account:

The Diocese of Orlando  
**DTC #0226**  
**Acct. # X62-097373**  
**Federal Employer Identification # 59-1215378**

2. Please contact me, or have your broker do so, so that I can identify the stock as coming from you and acknowledge you for tax purposes. Feel free to e-mail me at [arojas@orlandodiocese.org](mailto:arojas@orlandodiocese.org), phone me at 407.246.4843, fax me at 407.246.4941, or mail me at the following address:

**The Diocese of Orlando**  
Attn: Aime Rojas  
P.O. Box 1800  
Orlando, FL 32802-1800

Please also let me know the following:

- (a) the **parish/school** that is to be the beneficiary, and
- (b) the **fund** that the proceeds should benefit:

(Offertory, Building, *Our Catholic Appeal*, *Alive in Christ*, or other projects at your parish/school)

Letting me know that you are transferring a stock to me will help *avoid any delay* in identifying you as the donor and in transferring the proceeds to your parish or school.

**Just a Reminder...** in order to take full advantage of the tax laws surrounding the gifting of appreciated securities, remember that the shares must have been held by you for at least one year. The Diocese is pleased to provide this stock transfer program as a service to our parishes and schools and does not charge a handling fee of any kind. Feel free to contact me at [arojas@orlandodiocese.org](mailto:arojas@orlandodiocese.org) or at **407.246.4843** with any questions.

Thank you for your kind generosity!

Aime Rojas  
Gifts Manager  
Diocese of Orlando