



**The Catholic Foundation  
of Central Florida**

Inspire Giving. Fund God's Work.

## **Donating Stock to the Diocese of Orlando for your Parish, School or other Diocesan Ministries**

The Catholic Foundation of Central Florida is honored to partner with the Diocese of Orlando and support your stewardship. We encourage gifts of stock via electronic transfer from your brokerage. This is the fastest and easiest way to give stock to benefit your parish, school or other Diocesan ministry! Just follow these two easy steps:

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

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

Note: Shares should be transferred in "Cash" not "Margin".

2. Please contact us, or have your broker do so, so that we can identify the stock as coming from you and acknowledge you for tax purposes. To ensure your contribution is directed as intended, please designate your gift to the **St. Vincent de Paul Campaign**. Our contact information is included below. Feel free to mail us at the following address:

**The Catholic Foundation of Central Florida, Inc.  
Attn: Nia Herald  
P.O. Box 4905  
Orlando, FL 32802**

Stock gifts are considered completed for tax purposes if they are received in our account by December 31<sup>st</sup>.

If you are interested in transferring shares held in certificate form or transfer book shares, please contact us for proper forms to complete this transfer.

***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 Catholic Foundation of Central Florida, through its service agreement with the Diocese of Orlando is pleased to provide this stock transfer program as a service to the people of God and our Diocese of Orlando parishes, schools, ministries and organizations.

**Nia Herald, CFO**

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**Susan Hunt, Controller**

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