



**The Catholic Foundation**

**of Central Florida**

Inspire Giving. Fund God's Work.



## Donating Stock to the Diocese of Orlando for your Parish or School

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**

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

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 [shunt@cfofc.org](mailto:shunt@cfofc.org), phone me at 407.246.4803, fax me at 407.246.4939, or mail me at the following address:

**The Diocese of Orlando**

Attn: Susan Hunt

P.O. Box 1800

Orlando, FL 32802-1800

Please advise which parish or school should benefit from your gift and to which area the proceeds should be directed (*Offertory, Our Catholic Appeal, Alive in Christ*).

If you are interested in transferring shares held in certificate form, please contact the undersigned for the appropriate forms needed or go to <http://www.cfofc.org/gifts-of-appreciated-securities> to download a stock power and deposit of securities form. Please send the completed forms to the address reference above. **Do not sign the stock certificate.**

**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. Always consult a tax professional before making a decision to donate shares.

Thank you for your kind generosity!

**Susan Hunt**

*Controller*

The Catholic Foundation of Central Florida, Inc.