



Give a Gift of Stock

In just a few simple steps, you can show your Catholic generosity by making a gift of stock. Your gift can support the endowment fund of your choice at the Catholic Foundation that benefits any parish, Catholic school, or many of the ministries of the Diocese of St. Augustine, or your gift can benefit the unrestricted fund of the foundation.

STEP ONE – Provide the below information to your broker.

Broker Name: Morgan Stanley
Broker Contact: Deb Kearney
Account Name: Diocese of St. Augustine
DTC #: 0015
Account Number: 394-062855
EIN: 59-3271754

STEP TWO – Tell us about your gift and mail this completed form to: Catholic Foundation, 11625 Old St. Augustine Road, Jacksonville, FL 32258, or fax it to (904)619-2358, or email it to catholicfoundation@dosafll.com.

Donor Name/s _____

Address _____

City _____ State _____ Zip _____

Phone (_____) _____ Email _____

Gift For the Benefit of (Entity Name/s) _____

Special Instructions _____

Name of Stock _____ Ticker/Symbol _____

Number of Shares _____ Expected Date of Transfer _____

Please contact me at the email () or phone number () above for confidential help in planning my legacy.

STEP THREE – Make the impact you desire! * Your generous gift will be used according to your wishes, and you will receive an acknowledgment confirming the receipt of your gift. Thank you!

*Join the growing number of Catholics who are choosing to leave a gift to their Church in their wills. Planning a future gift gives you peace of mind that your life’s work will benefit what you love most.

Questions? Contact Kelly C. Wood at (904)262-3200, ext. 139 or kwood@dosfl.com.