



**The Catholic Foundation
of Central Florida**

Inspire Giving. Fund God's Work.

Donating Stock to the Catholic Foundation of Central Florida or 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 an endowment, reserve fund, donor advised fund, your parish, school or other Diocesan ministry! Just follow these two easy steps:

1. Contact 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 Nia Herald directly, or have your broker do so, so that we can identify the stock as coming from you and acknowledge you for tax purposes. Please confirm the number of shares, type of stock, and how the proceeds from the sale of stock should be directed to one or multiple appeals. Donor or usage information is not included with the stock transfer for our reference. Contact information is included below.

**Phone: (407) 246-7186
Email: nherald@cfof.org**

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

A few things to remember:

- Stock gifts are considered completed for tax purposes on the date shares are deposited into the Diocesan brokerage account.
- 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.
- 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.