



INSTRUCTIONS FOR A NON-CASH GIFT

Thank you for requesting instructions to donate a Non-Cash gift to the Diocese of St. Augustine. This includes a transfer of appreciated stock, an IRA Distribution, a check sent from a Donor Advised Fund or personal check.

Please note: regardless of your method of donation, the attached Donor Form should be sent back to Patricia Maroney either by mail (address below) or email pmaroney@dos afl.com in order for an accurate and timely disbursement of your gift.

STOCK GIFT:

1. If your stock is to be sent electronically from your Brokerage Firm, please provide your broker the following transfer information:

Morgan Stanley Dean Witter; c/o Kim Bouscher
50 Laura St., Ste 2000
Jacksonville, FL 32202
904-632-0200
Diocese of St. Augustine Account Number: 513-062855-216
DTC #0015

IRA DISTRIBUTION:

2. Kindly indicate the company that your IRA gift will be coming from, as well it's intended designation on the Donor Form attached. The check should be sent to:

Diocese of St. Augustine
Attn: Patricia Maroney
11625 Old St. Augustine Road
Jacksonville, FL 32258

DONOR ADVISED FUND, PERSONAL CHECK

3. Please send your check to Patricia Maroney at the address above, along with your Donor Form.

If you have any questions, please feel free to reach out to Patricia at 904-208-6951 or via email. Once again, thank you for your generous stewardship & support for our Church.

Respectfully,

Patricia Maroney
Executive Assistant to the Chief Financial Officer



DIOCESE OF St Augustine

FINANCIAL INSTRUMENTS DONOR FORM

DONOR CONTACT INFORMATION

Donor Name:	Street Address:
Phone Number:	City:
E-mail Address:	State, Zip Code:

DONOR'S BROKER, TRUST, OR ANOTHER AGENCY INFORMATION

Organization Name:	Street Address:
Contact Name:	City:
Contact Phone Number:	State, Zip Code:
Contact E-mail Address:	

DONATION

Select Donation Type:	Stock	IRA Distribution	Donor Advised Fund	Check	Other:
Estimated Total Value, in dollars, of donation: \$					
If applicable, please provide the ticker symbol and relative # of shares being donated below:					
Stock Ticker:	# of Shares:	Stock Ticker:	# of Shares:		
Stock Ticker:	# of Shares:	Stock Ticker:	# of Shares:		

DONOR DESIGNATED CHARITY

% of Donation:	To Be Applied to the:	Designation Details:		
%	Parish	Parish Name:		
%	School	School Name:		
%	Catholic Foundation (Restricted)	Restricted Entity Name:		
%	Catholic Foundation (Unrestricted)			
%	Bishop's Annual Stewardship Appeal			
%	Bishop's Vision	For the Bishop's Vision, select from the following:		
Total Above Must Equal 100%	Unrestricted	Campus Ministry	Eucharistic Congress	Mission at Cedar Key
	Pro-Life	Seminarians	Rural Education Initiative	Youth Ministry
	FOCUS	Other:		

Gifts for the Catholic Foundation must be made payable to the Catholic Foundation, all other gifts must be made payable to the Diocese of St. Augustine. If gifts are restricted or for the benefit of a specific endowment fund, please indicate which parish, school or other ministry's fund should receive the gift.

Other Comments:

X

Date: _____

Full Name of Donor
Title (If Applicable)

Please email this form to Patricia Maroney, Executive Assistant at pmaroney@dosaf1.com

For questions, call Patty at (904) 262-3200 x 132

Physical mail delivery-Diocese of St. Augustine, Attn: Patricia Maroney

11625 Old St. Augustine Rd, Jacksonville, FL 32258