



For Office Use Only

Donor ID:

Gift of Stock Donation Form

Thank you for trusting your gift to our care, we take that trust seriously. Here's the process – before we can help, you must take the first 2 steps:

1. Please complete this form. Submit the completed form to your financial advisor or stock broker.
2. Send an additional copy of this form to info@catholicfsmn.org or mailing address below.
3. When the stock gift donation is received (please allow up to 14 business days) we will send you a confirmation of receipt)
4. We will provide a tax receipt in January of each year for your tax preparation.
5. Questions? Please call 507-858-1276.

Form for Donor to Complete

Donor Full Legal Name: _____

Donor Mailing Address: _____

Email Address: (used to confirm receipt of gift) _____

Phone Number: _____

Parish and City: _____

Gift Designation: _____

(where do you want us to direct this gift? To Catholic Ministries Appeal? Seeds of Faith? Your Parish?

If applicable, include gift usage restrictions)

Name of Stock: _____ Number of Shares: _____

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Brokerage firm stock is currently held with (from whom should we expect the transfer?)

Name & Phone Number _____

Instructions for Transfer Agent:

Please notify CFSM of transfer to identify donor & designation.

Broker Number: DTC-0057

FBO: Catholic Foundation of Southern
Minnesota (EIN 41-1691198)

750 Terrace Heights, Suite 105, PO Box 30098
Winona, MN 55987

Edward Jones Account Number: 553-05530-1-4

Broker: Edward Jones

Kim Classon, 507-452-7470

157 West Third Street

Winona MN 55987