



Date (Internal Use Only):

___/___/___

Stock Gift Form

Donor Information

Please submit the following information to your financial advisor/stock broker **and** send or email a copy to the **Catholic Foundation of Southern Minnesota** at info@catholicfsmn.org to ensure that your gift can be identified when it arrives at Edward Jones and to make certain that you and your parish are properly credited for your generous donation.

Date: _____ Donor ID: _____

Donor Name: _____

Donor Address: _____

City: _____ State: _____ Zip: _____

Parish: _____ Parish City: _____

Campaign/Appeal or Designation: _____
(ie. Catholic Ministries Appeal, Rooted in Faith, or other specific reason/benefiting organization)

Name of Stock: (1) _____ *Number of Shares*

Name of Stock: (2) _____ *Number of Shares*

Name of Stock: (3) _____ *Number of Shares*

Broker Firm Before Transfer: _____

I. Instructions for Transfer Agent

Broker Number (DTC):
FBO:

DTC-0057
Catholic Foundation of Southern Minnesota (EIN 41-1691198)
750 Terrace Heights, Suite 105
PO Box 30098
Winona, MN 55987

Edward Jones Account Number:
Broker:

553-05530-1-4
Edward Jones
Kim Clausen
157 West Third Street
Winona, MN 55987
(507) 452-7470

Please provide a notification to CFMSM to help identify the donor and Designation of donation.