

Gift of Stock

St. James Cathedral School does accept gifts of stock. It is the fastest and easiest way to give stock to benefit St. James. Just follow these easy steps:

1. Write or phone your broker authorizing them to transfer X number of "XYZ Security" *in kind* to our Fidelity Investment account:

The Diocese of Orlando

DTC #0226

Account # X62-097373

Federal Employer Identification # 59-1215378

Note: Shares should be transferred in "Cash" not "Margin.". Any transfer of stock is to be handled in the following manner:

2. Please inform me that a transfer is being made, include the your name and the name of stock being transfer. I can then identify the stock as coming from you and acknowledge your gift for you for tax purposes. Feel free to email me at ana.crowe@stjcs.com or phone me at 407-851-4432, ext. 151, fax me 407-648-4603. The donor should notify Ana Crowe via email at ana.crowe@stjcs.com or call 407-841-4432, ext. 151. Donors should not contact Fidelity directly. This ensures that funds will not be misdirected between the school and the parish.

If you are interested in transferring shares held in certificate form, please contact Ana Crowe at ana.crowe@stjcs.com or call 407-841-4432, ext. 151 for the appropriate forms needed or click [here](#). Please send the completed forms to:

St. James Cathedral School

Attn: Ana Crowe

505 East Ridgewood Street

Orlando, FL 32803