

# Gifts of stock/securities to the Diocese of Palm Beach or one of its entities



You can enjoy tax savings by donating gifts of stock to the Diocese of Palm Beach for use wherever the diocese deems the need is greatest or for use by a parish, school or ministry.

By giving a gift of appreciated securities, you can avoid paying capital gains tax on the stock or security, receive a charitable gift deduction on your tax return, and the diocese, parish or diocesan ministry receives the full value of your security.

Please instruct your broker to transfer the stock to the Diocese of Palm Beach; do not instruct your broker to sell the stock, either in your name or in the diocese's name. Your charitable gift deduction is calculated on the date the security is transferred into the Diocese of Palm Beach's brokerage account. When completing this transaction, please indicate which Diocese of Palm Beach entity you would like your gift to benefit (DSA, a school, a parish, Lumen Christi Schools Appeal, Catholic Charities, etc.).

Kindly print and fill out the Stock Transfer Form found at [www.DiocesePB.org](http://www.DiocesePB.org) and send a copy to your broker and another copy to Vito Gendusa, CFO, at the diocesan Development Office:



**DIOCESE OF  
PALM BEACH**

Diocese of Palm Beach  
P.O. Box 109650  
Palm Beach Gardens,  
FL 33410-9650

For further information please call  
(561)775-9518 and speak with  
Vito Gendusa, CFO, in the  
Office of Development at the  
Diocese of Palm Beach.