

INSTRUCTIONS FOR THE TRANSFER OF SECURITIES TO THE DIOCESE OF ST. PETERSBURG

The Campaign Processing Office will administer all diocesan donations and gifts in accordance with diocesan policy and procedures. All stock gifts/donations will be credited directly to the parish, school, or diocesan entity designated by the donor and in accordance with the donor's wishes.

We request that the donor provide notification of the number of shares, name/s of the securities being gifted and how the gift should be applied. Notification should be sent to:

Diocese of St. Petersburg
Campaign Processing Office – Stock
P.O. Box 40200
St. Petersburg, FL 33743-0200

FOR DIRECT TRANSFERS (Broker to Broker) TO THE DIOCESE OF ST. PETERSBURG
and for all diocesan entities, please use one of the following authorized brokerages:

Account information for MORGAN STANLEY

Contact person: Tony Pastore
Phone: (813) 286-5628
Email: Tony.pastore@morganstanley.com
Address: Two Urban Centre
4890 West Kennedy Blvd. Suite 700
Tampa, FL 33609
DTC#: 0015
DOSP Account#: 506-124909-189

Account information for RAYMOND JAMES

Contact person: Bob Hilton	Contact person: Robert Carney
Phone: (727) 567-1891	Phone: (813) 634-5536
Email: Bob.Hilton@raymondjames.com	Email: Robert.carney@raymondjames.com
Address: 880 Carillon Parkway-32E St. Petersburg, FL 33701	Address: 133 S. Pebble Beach Blvd. 1 st Floor Sun City Center, FL 33573
DTC#: 0725	DTC#: 0725
DOSP Account#: 15485553	DOSP Account#: 10612844
Kimberly.smetana@raymondjames.com	Carissa.aliaga-mbulo@raymondjames.com

Account information for MERRILL LYNCH

Contact person: Joel Manings	Contact person: Tricia Campbell
Phone: (727) 824-7398	Phone: (727) 824-7348
Email: joel_manings@ml.com	Email: tricia.campbell@ml.com
Address: One Progress Place St. Petersburg, FL 33701	
DTC#: 5198	
DOSP Account#: 781-96043	

Account information for CHARLES SCHWAB

Contact person: Kathy King, Campaign Processing Office
Phone: (727) 341-6841
Email: kck@dosp.org

If you should have any questions or concerns, please do not hesitate to contact
gift processing staff at (727) 341-6841 or giftprocessing@dosp.org