



GIFTS OF SECURITIES

POLICY

When donors wish to directly transfer securities and publicly traded stocks to the Archdiocese of Miami, or its parishes, schools or related entities therein, the securities must be transferred into the brokerage account for the Archdiocese of Miami. The Archdiocese of Miami Development Corporation will manage the securities donation on behalf of the parishes, schools and archdiocesan entities and ensure the donations are allocated accordingly to the wishes and instructions of the donor.

PURPOSE

The purpose of this policy is to provide a systematic means of receiving and liquidating gifts of securities to the Archdiocese of Miami and its parishes, schools and other related entities.

PROCEDURE

When donors wish to directly transfer securities to the Archdiocese of Miami, the following instructions need to be provided to the donor, their broker or custodian. The donor should request that his broker transfer free via DTC as follows:

Robert W. Baird & Co., Inc.
DTC #0547
Archdiocese of Miami
Attn: Katie Blanco Bourdeau
A/C #1179-9249

At the same time the donor should provide information as to the type of security and shares transferred, along with who is the recipient (specific parish, Archbishop's Charities Drive (ABCD), specific program or ministry, etc.) of the donation to:

Mrs. Katie Blanco Bourdeau
Archdiocese of Miami
9401 Biscayne Blvd.
Miami Shores, FL 33138
(305)762-1053
Fax: (305)762-1020
E-Mail: kblanco@theadom.org

This information is needed to ensure that the donation is distributed in accordance with the donor's wishes.

Initial: December, 2011
Current: September, 2021