

## TRANSFER SECURITIES USING A BROKER

Date \_\_\_\_\_

Donor Name \_\_\_\_\_

Donor Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Donor Phone \_\_\_\_\_

Broker Name \_\_\_\_\_

Donor Account Number \_\_\_\_\_

Gentlemen:

Enclosed you will find the following securities:

List Securities \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

On the date that you receive this letter and enclosures, I am making an irrevocable gift of these securities to the Most Reverend Gerald M. Barbarito, as Bishop of the Diocese of Palm Beach, his successors in office, a corporation sole. The address is: Diocese of Palm Beach, Office of Development, PO Box 109650, Palm Beach Gardens, FL 33410-9650. These securities are to be held by you for the account of "THE BISHOP OF THE DIOCESE OF PALM BEACH."

I request that you notify Ms. Lyndsay Von Bokern, Development Coordinator, that you are transferring these securities and ask for instructions. You may contact her by phone at (561) 775-9590 or by e-mail at [lyndsav@diocesepb.org](mailto:lyndsav@diocesepb.org) on the same day that you receive this letter to ensure the completion of my gift on this day.

Also, when you contact her, please advise her of the designated use for my gift as follows:

Designated Use \_\_\_\_\_

Thank you for your prompt attention to this matter. If you have any questions, please call me at my phone number listed above.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

cc: **Ms. Lyndsay Von Bokern**  
**Office of Development**  
**Diocese of Palm Beach**  
**P.O. Box 109650**  
**Palm Beach Gardens, FL 33410-9650**