



CATHOLIC FOUNDATION
of West Michigan

Give a Gift of Stock

In just a few simple steps, you can show your Catholic generosity by making a gift of stock. Your gift of stock can support an existing fund or create a new fund to support your parish, school or field of interest of your choosing.

STEP ONE - Contact your broker or financial advisor

Share the below information and the specific number of shares of a named security you wish to donate directly to the Catholic Foundation of West Michigan.

Broker Name: Raymond James
Broker Contact: John Osbourne, (616) 974-3003
john.osbourne@raymondjames.com
Account Name: Catholic Foundation of West Michigan
DTC #: 0725
Account Number: 257TY131
EIN: 38-3298981

STEP TWO - Inform the Catholic Foundation of West Michigan

Once the stock transfer is requested, please fill out and send the following information to the Catholic Foundation of West Michigan by email at info@cfwmi.org or fax 616.551.5634.

Donor Name(s) _____

Address _____

City _____ State _____ Zip _____

Phone (_____) _____ Email _____

For the benefit of (fund) _____

Expected Date of Transfer _____

Name of Stock _____ Symbol _____ # of Shares _____

STEP THREE - Make an impact to a cause that is important to you

The Catholic Foundation of West Michigan will use your gift according to your intent. In addition to the acknowledgement letter you will receive, the Catholic Foundation will report back on how your gift made a difference.

Thank you for giving wholeheartedly!