



## Diocese of Austin

6225 E Highway 290 · Austin, TX 78723  
(512) 949-2400 · Fax (512) 949-2520  
[www.austindiocese.org](http://www.austindiocese.org)

### **How to make a gift of stock or mutual funds to St. Mary, Our Lady of the Lake “Cherishing Our Past, Building Our Future” Campaign**

#### **Identifying your gift...**

In order for us to properly identify and apply your gift, please call Lisa Rosenberger at the Diocese of Austin at (512) 949-2450 prior to making your gift. Please have all of the following information available:

- ✘ Number of shares
- ✘ Name of the stock/mutual fund
- ✘ Approximate value of the gift
- ✘ Designation (St. Mary, Lago Vista “Cherishing Our Past, Building Our Future” campaign)
- ✘ Your broker or transfer agent’s contact information
- ✘ Approximate date you will make the gift

All information gathered is strictly confidential, and our number is a secure line. It is never safe to share confidential information in an e-mail.

#### **Currently, we accept gifts of stock in one of two ways.**

##### Direct (DTC) transfer from your broker to ours.

Once we have obtained the above information, we will release the Diocese of Austin’s account number and DTC number for you to give to your broker. Please do not use this account information or the diocese’s EIN without first discussing your gift with us.

##### Online transfer agents and non-DTC accounts.

Currently, we are able to accept donations through the following agents:

- Computershare: IBM stock
- Computershare: Johnson & Johnson stock
- Computershare: AT&T stock
- E\*Trade
- Fidelity
- Vanguard

After notifying us of your gift, you will obtain the transfer agent’s transfer request form, complete the form, and mail it to Lisa Rosenberger at:

Diocese of Austin  
6225 Hwy 290 E  
Austin, TX 78723

If you would like to donate stock through an agent not listed above, please call Lisa Rosenberger at (512) 949-2450.

**Please note** gifts of stock using this method may take up to six weeks to complete. Shares may not leave your account as soon as expected. Please plan accordingly, especially as relates to your taxes.

**Thank you for your generosity to St. Mary, Our Lady of the Lake.**