



Serving the Parishes, Schools & Good Works  
of the Diocese of Venice in Florida

# Donor Advised Fund Deposit Form

*Please complete this form and submit it along with your Donor Advised Fund contribution*

## Fund Information

Fund Name: \_\_\_\_\_ Fund #: \_\_\_\_\_

Date of Contribution: \_\_\_\_\_

## Donor Information

Mr.  Mrs.  Ms.  Dr.  Reverend  Sister  Other \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

## Contribution Details

**IMPORTANT: Please contact our office prior to sending money or transferring securities.**

Check Amount \$: \_\_\_\_\_

Securities # of Shares: \_\_\_\_\_ Company Name: \_\_\_\_\_ Approx. Value \$: \_\_\_\_\_

Mutual Funds # of Shares: \_\_\_\_\_ Company Name: \_\_\_\_\_ Approx. Value \$: \_\_\_\_\_

Other Description: \_\_\_\_\_

## Instructions for Stock Transfer

If transferring securities or mutual funds through a broker, please have the broker contact the Catholic Community Foundation of SW Florida directly at 941-441-1124 for the required information.