

Donating Publicly Traded Securities
to The Roman Catholic Diocese of Nelson



Thank you for considering a gift of mutual funds, equities or other securities to the Roman Catholic Diocese of Nelson. My office helps the Diocese administer such “in kind” donations.

To expedite your generosity’s successful receipt, please:

1. Complete and sign the attached “Security Transfers” letter for the Diocese or Foundation. Your investment advisor or firm can provide the information requested within. Forwarding your completed letter directly to the Diocese enables them to initiate the transfer of your gift from your account.
2. **Alternatively**, you or your investment firm could initiate the transfer yourself by:
 - a. Faxing one copy to your advisor or investment firm to make them aware of your intentions;
 - b. Faxing one copy to Raymond James’ Transfer department at (604) 654-1403; and
 - c. Faxing one copy to my office at (250) 763-9330 so I can monitor successful progress.

Please Note:

- Transfers are usually initiated within 24 hours then take 3 – 10 business days to complete;
- Rejected transfers are most often caused by incomplete or inaccurate;
- Some products are non-transferable / redeemable so donate them might not be possible. If uncertain, please ask your advisor;
- The Diocese will issue a receipt for your donation and send directly to your attention.

Warmest Regards,



Hal G. Spelliscy, CIM, FCSI
Portfolio Manager

Oram Spelliscy Family Wealth Management
Raymond James Private Investment Management Group
hal.spelliscy@raymondjames.ca