

# GIFTS OF STOCKS OR SECURITIES

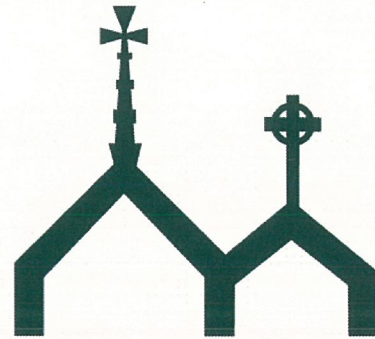
## Making Stock or Security Gifts to Good Shepherd Catholic Parish

Making a charitable gift of stock or securities can be an easy and tax-effective way for you to make an impact on Good Shepherd Catholic Parish through our Honoring Our Traditions-Building Our Future campaign. Your campaign pledge can be made or fulfilled in this popular, convenient, and economical way.

You can donate any publicly traded stocks, mutual funds, Treasury bills and notes, corporate and municipal bonds, or stock in non-publicly held companies.

### Benefits

- A potential Income Tax Charitable Deduction for the full market value of the securities at the time you make the donation.
- Generally, if the asset has increased in value, donating the stock or security directly to the church increases the amount of your gift as well as your tax deduction.
- In most cases, if the asset has decreased in value since you purchased it, it is best to sell it, take the capital loss for tax purposes, and then donate the cash.
- Potentially avoiding capital gains tax on the appreciated portion of the stock if it were sold.
- Having an important impact on achieving our campaign goals and plans for Good Shepherd Catholic Parish.



### Honoring Our Traditions Building Our Future

### Gift Valuation

- For publicly traded securities, the value of the gift is the average of the high and low on the date of the gift.
- Mutual Fund shares are valued using the closing price on the date of the gift.

**As always, please consult with your financial advisor before entering into a gift arrangement.**

*“But who am I, and who are my people,  
that we should be able to give as generously as this?  
Everything comes from you, and we have given you  
only what comes from your hand.”*

1 Chronicles 29:14-16

## How to Give Stock

If you hold the certificates on the stock, you can direct the company to reissue some shares in the name of Good Shepherd Catholic Parish.

If your broker holds the certificates, you must send your broker a letter signed by you (and your spouse if held jointly) indicating how many shares you wish to transfer to Good Shepherd Catholic Parish by either:

- Issuing a new certificate to Good Shepherd Catholic Parish
- OR
- Transferring shares electronically (please notify Ruth Becker at 812-477-5405)

Either way you will need to include Good Shepherd Catholic Parish Federal Tax ID#: 35-1073917



Good Shepherd Catholic Parish. is a not-for-profit charitable 501(c)(3) organization. All contributions are tax deductible within the limits of the law.

### If you have any questions or want more information, please contact:

Ron Pohl, Creative Giving Chair for our Honoring Our Traditions– Building Our Future campaign at Good Shepherd Catholic Parish.

Email: [ron@rjpohl.com](mailto:ron@rjpohl.com)

Phone: (812) 205-5973

## How to Make a Stock Transfer

- For stock held in brokerage accounts, your financial advisor or trust officer can assist you in making a gift of stock via a direct transfer to Good Shepherd Catholic Parish.
- Not all mutual funds transfer through our DTC number. For these and gifts of stock not held in a brokerage account, please contact our campaign office for details.
- Also, please notify our campaign office of all stock transfers so we can confirm them.

## Church Transfer Information

Broker: **RW Baird**

Account Name: **Catholic Diocese Parish Account**

Account #: **4224-6387**

DTC: **0547**

Federal Tax ID#: **35-1044322**

Financial Advisor: **Dianne Daniel**

Phone: **812-426-1481**

Mailing Address: **RW Baird**

**110 Main Street**

**Evansville, IN 47708**

