

Guide to Stock Transfer Gifts

Tax Benefits

If you wish to donate a large gift to the Catholic Community Foundation, you can make a transfer of stock instead of a transfer from your cash accounts. Instead of selling stock, transferring stock of appreciated value directly to the Catholic Community Foundation exempts you from paying the capital gains tax. *This information is not intended as tax, legal, or financial advice. Consult your personal professional advisors for information specific to your situation.*

How to Make a Stock Transfer

1. Contact your broker to transfer a gift of stock to the Catholic Community Foundation. Our account information is:

Name: Catholic Community Foundation of Mid-Michigan

DTC Number: 0725

Account Number: 13603182

Federal Tax ID Number: 20-4595721

Receiving Broker:

Raymond James & Associates

Attn: Dale Jurek

4215 Fashion Square Blvd Ste 1

Saginaw, MI 48603

2. Notify the Catholic Community Foundation of your stock transfer gift intention. Please include:

Donor Name

Address

Phone Number

Email

Name of Security

Number of Shares

Anticipated Date of Delivery

Gift Designation