

Donate stocks or other appreciated assets to the Church.

We make it easy to support the Diocese of Fort Worth, your parish, Catholic school or other ministry.

Make a bigger impact by donating long-term appreciated securities, including stock, bonds and mutual funds, directly to the Advancement Foundation. Compared with donating cash or selling your appreciated securities and contributing the after-tax proceeds, you may be able to automatically increase your gift and your tax deduction.

By donating appreciated assets directly to the Advancement Foundation for the benefit of the Diocese of Fort Worth, your parish, a Catholic school or other ministry, you allow the Church to receive the full pretax value of those appreciated assets.

EXAMPLE: Assume you sell \$1,000 worth of stock that you've held for more than a year in order to donate the proceeds to the Advancement Foundation, with \$500 designated to your parish capital campaign and \$500 to fulfill your commitment to the Annual Diocesan Appeal. After paying any capital gains taxes, you'd be left with less than \$1,000 to give to the Advancement Foundation. But if you donate that same \$1,000 of appreciated stock directly to the Advancement Foundation through an electronic FOP transfer:

- The Advancement Foundation will process the gift and provide a tax receipt for full \$1,000 donation value.
- You can deduct the full \$1,000 value of your donation on your tax return.

To obtain a deduction for the current tax year, the stock transfer must be completed by December 31. For electronic transfers from your brokerage account, the donation is recorded on the day it is received by the Advancement Foundation account (not the date you approve the transfer).

For donations of real estate, mineral interests, international equities/financial instruments or cryptocurrencies, please contact Clint Weber, cweber@adv-fdn.org or (817) 533-3171.



Please complete the form on reverse and return to:

201 Main Street, Suite 1198, Fort Worth TX 76102-3101
drhoads@adv-fdn.org

advancementfoundation.org | (817) 533-3174

LETTER OF INTENT | ELECTRONIC TRANSFER OF U.S. STOCK OR MUTUAL FUNDS

Please complete this form for donations of stock or mutual funds.
For further assistance, please contact Dianna Rhoads at (817) 533-3174 or drhoads@adv-fdn.org

Please accept my donation of _____ (NUMBER OF SHARES) of
_____ (COMPANY) ☐ Stocks ☐ Mutual Funds

STOCK DONATIONS

Please provide the following information to your stockbroker:

- Account title: **Catholic Diocese of Fort Worth Advancement Foundation**
- Interactive Brokers **Acct. #: U5243614 | DTC #: 0534**
- **All transactions must be FOP transfers.**
- **US stocks only. For international equities, financial instruments or cryptocurrencies, contact Clint Weber, cweber@adv-fdn.org, (817) 533-3171.**

MUTUAL FUND DONATIONS

Please provide the following information to your mutual fund account administrator:

- Account title: **Catholic Diocese of Fort Worth Advancement Foundation**
- Raymond James Financial Services, Inc.
Omnibus BIN: 92500015 | Acct. #: 19229861 DTC #: 0725
- Account consultant:
David Malleck | (972) 701-2040

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

Parish Name, City: _____

Credit my donation to the Catholic Diocese of Fort Worth Advancement Foundation for the benefit of:

☐ **Parish:** _____

☐ Endowment

☐ Capital Campaign

☐ Offertory

☐ **Catholic School:** _____

☐ Annual Diocesan Appeal

☐ Saint John Paul II Shepherd's Guild (Seminar Education)

☐ Priest Care Fund

☐ Catholic Schools Tuition Assistance Fund

☐ **Other:** _____

Broker Name / Acct. #: _____

Comments / Special Instructions: _____



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