

Donate stocks or other 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 transfer:

- The Advancement Foundation can usually sell the stock and receive the full \$1,000, tax-free
- You could potentially 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 at Merrill Lynch (not when you approve the transfer).



Please complete the form on reverse and return to:

800 W Loop 820 South, Fort Worth TX 76108
drhoads@advancementfoundation.org

advancementfoundation.org | (817) 560-3300

LETTER OF INTENT ELECTRONIC TRANSFER OF STOCK

Please complete this form for donations of stock.
For further assistance, please contact Dianna Rhoads at
(817) 945-9463 drhoads@advancementfoundation.org

It is my intention to transfer shares of stock. (PLEASE PRINT)

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

Parish Name, City: _____

I will donate _____ (# of shares) **of** _____ (company) **stock**
to be credited 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: _____

Comments / Special Instructions: _____

Information to provide to your broker / Please handle the transfer of this stock to the account of the Catholic Diocese of Fort Worth Advancement Foundation at Merrill Lynch, Pierce, Fenner & Smith, Inc. (Merrill Lynch), 201 Main Street, Suite 2100, Fort Worth TX 76102-3122 | **Acct# 552-04032 / DCT #8862**
The Client Associate for this account is Wade Jewett at (817) 877-9659.



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