



## Gifts of Stock

### You can avoid a tax liability and support Bishop Chatard High School.

Donating a highly appreciated asset may allow you to avoid a significant portion of your tax liability while still receiving a charitable deduction. The gift of an appreciated asset is also a powerful way to support the mission of Bishop Chatard.

### How Stock Donations Benefit You.

- A federal income tax charitable deduction when you itemize
- Deduct the full fair market value if you've held the stock for at least one year
- Use your deduction up to 30% of your adjusted gross income; carry any unused deduction forward for up to five additional years
- Avoid paying capital gains tax on all stock donated to Bishop Chatard High School

### What is the value of my gift?

Stock gifts are receipted for tax purposes by multiplying the number of shares by the average price of the stock on the day it enters Bishop Chatard's account. The actual proceeds to Bishop Chatard may be higher or lower.

### How Can I Make a Gift of Appreciated Securities to Bishop Chatard High School?

- A. **Electronically** - In order to make a transfer of stock to Bishop Chatard High School, please have your stock representative make an electronic transfer to UBS Financial Services using the following information:

Account Number: IP49440-41

DTC Number: 0221

Broker Name: John Duffy (317) 816-1827 or John Klausner (317) 816-1826

- B. **Manually** – Certificate needs to be signed by the donor (on the back, bottom right-hand side, as the front of the certificate is registered) and delivered to:

Bishop Chatard High School  
Attn: Advancement Department  
5885 Crittenden Ave  
Indianapolis, IN 46220  
Tax ID#35-1063332

### I've Already Made My Gift. Now What?

Please notify us of all stock gifts. A transfer document only gives the name of the stock and the value per stock. It is very difficult to discover the name of the donor who actually made the stock gift unless we hear from you first.

Liz Hoffman, Donor Information Manager

Email: [lhoffman@BishopChatard.org](mailto:lhoffman@BishopChatard.org)

Phone: (317) 251-1451 ext. 2275

Please include:

- a) Your name
- b) Stock name
- c) Number of shares
- d) Date they are going to be transferred
- e) Where to apply the donation (annual fund, capital campaign, towards a pledge etc.)

### Questions?

If you have any questions about giving stock, please call the Advancement Office at (317) 251-1451 ext. 2242. You may also email **Nicole Beasley, VP of Institutional Advancement** at [nbeasley@BishopChatard.org](mailto:nbeasley@BishopChatard.org).

*Please note: We strongly encourage you to discuss your tax situation with an attorney or accountant.*