



## 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. *Note:* Mutual funds do not transfer like common stock. Please contact Liz Hoffman, Donor Information Manager, using her contact information below, to donate mutual funds.

### How Can I Make a Gift of Appreciated Securities to Bishop Chatard H. S.?

- A. Electronically - Notify your broker or account representative that you wish to transfer stock. The transfer information needed by your broker or account representative is:
- i. Account Number: 337-136954
  - ii. DTC Number: #0015
  - iii. Account Name: Roman Catholic Archdiocese of Indianapolis
  - iv. Address and Contact Information:
- |                                             |                            |
|---------------------------------------------|----------------------------|
| Klausner & Duffy Investment Group           | Broker: John Duffy         |
| Morgan Stanley Smith Barney                 | Associate: Caryn Wilkinson |
| 800 East 96 <sup>th</sup> Street, Suite 400 | Phone: 317-818-7388        |
| Indianapolis, IN 46240                      | Fax: 317-536-3056          |
- 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. Contact:

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.)

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