



GIFT OF STOCK

Thank you for your interest in making a charitable gift to the Catholic Schools of Broome County (CSBC) through the Catholic Schools of Broome County Foundation (CSBCF) in the form of a stock Transfer.

The Catholic Schools of Broome County Foundation was incorporated as a 501(c)3 corporation in 1975. By prudently managing the long-term growth of its investment portfolio, the CSBCF offers the CSBC the ability to fulfill its mission to foster the development of students who are spiritually minded, academically successful, and who are inspired to impact our world as compassionate and moral citizens.

Please complete and return the second page of this form to receive your tax acknowledgment.

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to CSBC via CSBCF. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

To make a donation of stock to CSBCF (Tax ID# 16-1058555), please note the following:

- ✓ **Brokerage House:** Visions Investment Servies - O'Connor Group
- ✓ **Account Name:** Catholic Schools of Broome County
- ✓ **Account Number:** 6181-0338
- ✓ **Financial Advisor:** LPL Financial - Leo O'Connor
- ✓ **Telephone Numbers:** P: 607.770.3800
- ✓ **DTC Number:** 0075
- ✓ **Reference:** Donor Name (including your name will ensure the gift is properly acknowledged).

Please Note: For mutual fund gifts, or for gifts of stock not held in a brokerage account, please contact the **LPL Financial** contact listed above.

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Please complete the information below to notify the **CSBCF** of your gift and help ensure it is processed accurately and fax or email the completed form to **(607) 723-4811** or **jboushie-bombard@syrdiocese.org**.

Donor & Securities Information:

Name & Type of Securities (e.g.: DELL common stock) Security Symbol Number of Shares ____/____/____
Transfer Date

Donor Name (Individual, Corporation, Foundation)

Donor Street Address

Donor City / State / Zip

Broker Name

Broker Company / City / State

Broker Contact / Telephone Number

Donor Telephone / Email Address (to be used only if a question arises in the donation process)

Donor Signature ____/____/____ Date Signed _____ Donor Signature ____/____/____ Date Signed

NOTE: All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering the **CSBCF** as the recipient of your charitable gift.

