



STOCK GIFTS

Learn the most efficient techniques for helping donors make gifts of appreciated stocks and mutual funds:



Your office manager, business manager or parish secretary can be instructed in the parish office on how to help donors learn the best way to give these gifts. Call Melanie Johnson in the Office of Stewardship and Development at 317-236-1459 or 800-382-9836, ext. 1459, for assistance.



Of course, you can always have the donor communicate directly with our office to facilitate the gift. A donor who has the stock certificates should send them with a letter that includes the donor name and address, the name and number of shares donated, and the designated beneficiary (parish, school or agency) to:

Archdiocese of Indianapolis
Office of Stewardship and Development
Attn: Melanie Johnson
1400 N. Meridian Street
Indianapolis, IN 46202-2367



In a separate envelope, the donor should mail a signed stock power to the same address. We'll do the rest. We can send the donor, or your office, copies of stock powers for this purpose.

If the stock is held in a brokerage account, your donor should ask his/her broker to electronically transfer the securities into an account of the Roman Catholic Archdiocese



of Indianapolis. Please instruct the donor to call Melanie Johnson to receive transfer code information and donor instructions.

In the case of a stock certificate, the gift will be effective on the postmarked date the securities are mailed or delivered by hand. For electronic transfers, the effective gift date is when the securities are received into the archdiocesan brokerage account. For further information, please consult the archdiocesan stock gifting policy, effective July 1, 1999, in your Catholic Community Foundation policy and resource manual.

Remind donors that appreciated stock can be used to fund a charitable gift annuity

Appreciated stock can be used to fund a charitable gift annuity, which will provide annual income to the donor(s) for a lifetime. There are tax benefits to the donor(s) and the ultimate gift will benefit the parish, school, agency or archdiocese as designated by the donor(s). Annuity rates increase with the age of the donor. For current annuity rates, please call:

Director of Gift Planning
Catholic Community Foundation, Inc.
Archdiocese of Indianapolis
1400 N. Meridian Street
Indianapolis, IN 46202-2367
317-236-1427 or 800-382-9836, ext. 1427

Stewardship