



## **GIFTS OF STOCK/SECURITIES – TRANSFER INSTRUCTIONS**

We appreciate your interest in a gift to Mother McAuley through a stock transfer. Transferring appreciated securities is an excellent way to support Mother McAuley and receive double tax benefits, including:

- Charitable income tax deduction based on full market value of the securities
- Avoidance of the capital gain tax due upon sale of the stock

To begin the process, inform your broker in writing that you wish to give appreciated securities to Mother McAuley High School. **Please alert Mother McAuley that a transfer has been initiated to by contacting Terry Corcoran, our CFO at [tcorcoran@mothermcauley.org](mailto:tcorcoran@mothermcauley.org) or 773-881-6507 and provide the following information below.** We will assist you and guide you through the process. Please note the settlement of the sale of stock may take up to 5-7 business days.

Name of Broker: \_\_\_\_\_ Date: \_\_\_\_\_  
Email Address of Broker: \_\_\_\_\_ Phone: \_\_\_\_\_

The following securities will be transferred to Mother McAuley Liberal Arts High School.

FROM:

Donor's Account Number: \_\_\_\_\_

Registration on Account: \_\_\_\_\_

Name of Security: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

Name of Security: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

TO:

Fifth Third Bank Account Name/ Mother McAuley High School, Institutional ID#: 11153

DTC Eligible Securities: Participant #2116, Agent Bank #10016, ABA# 230028890204

Federal Reserve Eligible Securities: ABA#042000314/Fifth Cin/1050, FFC A/C#230028890204

Contact: Sara Booms, 312-704-4146, Fifth Third Institutional Services, [Sara.Booms@53.com](mailto:Sara.Booms@53.com).

- It is imperative that these shares be transferred, not sold, out of your account in order to complete a charitable gift to Mother McAuley.
- The value of your gift will be calculated by using the mean value of each share on the date the shares arrive in our brokerage or mutual fund account. A proper tax receipt will be based on this amount.

- If you are concerned about the timing of your gift, please be sure to work closely with your broker or mutual fund company to ensure that the shares are transferred in a timely manner.