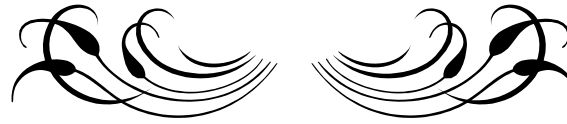


Reminders

- Charitable gifts made by December 31 are deductible for that same tax year.
- Gifts of appreciated stock or mutual fund shares owned for more than one year can generate greater tax savings than a gift of cash.
- For tax purposes, gifts of appreciated stock or mutual fund shares are valued as of the date on which the gift is complete. This may be the date of delivery, postmark, or transfer, depending how your gift is made.
- Gifts of appreciated stock or mutual fund shares may take longer to complete than gifts of cash. Allow extra time when making these gifts at year's end to ensure a deduction in the same tax year.
- Employer matching may allow you to double or triple your gift. Check with your company's benefits office to see if they offer a matching gift program.
- The IRS requires that you have a written receipt for gifts of \$250 or more. Keep all written acknowledgments of gifts you make.

Diocese of Crookston Catholic Community Foundation



Planned Giving Office
P. O. Box 610
Crookston, MN 56716-0610
Office 218 281-4533
Fax 218 281-3328
Email ccf@crookston.org

**Leave a Legacy of Faith
A Gift to Nurture the Catholic Faith**

**Giving
Appreciated
Securities and
Mutual Funds
To the
Catholic Community
Foundation**

**The Catholic Community
FOUNDATION**

Guidelines for Giving

Giving appreciated securities or mutual funds shares that you have owned for more than one year is one of the best ways of giving to the Catholic Community Foundation. Such a gift can maximize your tax savings and the impact you can have on the Diocese and the People of God.

Giving appreciated stock is generally a simple process. Donating mutual fund shares is more involved and usually requires establishing an account in the name of the foundation with the specific mutual fund and then transferring the shares.

Advantages:

- Receive an income tax deduction based on the market value of the security at the time of the gift.
- Avoid capital gains taxes.
- Direct your gift to the variety of different ministries.
- Fund an income producing gift plan and potentially increase your net income.

Appreciated Securities

Transfer Instructions For Stock Held with a Broker:

1. Call the Planned Giving Office to notify us of your gift.
2. Instruct your broker in writing to transfer the stock directly to the Foundation brokerage account.
3. Confirm your gift with a letter to the Planned Giving Officer with a copy of the letter of instructions to your broker. Describing in this letter the securities and specifying how the Diocese should use your gift.

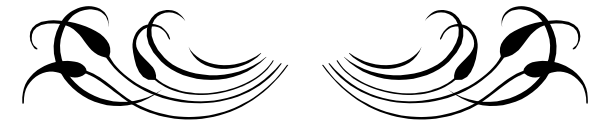
Instructions for Stock Held in Certificate Form:

1. Call the Planned Giving Office to notify us of your gift.
 2. Mail the unendorsed certificate, along with a letter of instruction to the Planned Giving Office.
- In a separate envelope, mail a stock power (signed and dated) for each certificate to the Planned Giving Office.

& Mutual Funds to CCF

Gifts of Mutual Funds:

If you would like to give mutual fund shares, to the Catholic Community Foundation please call the Planned Giving Office for special instructions.



**Diocese of Crookston
Catholic Community Foundation**

Please consult with your tax and/or legal advisors about proceeding with your estate plan.