

THE EPISCOPAL DIOCESE OF OHIO

COMPLETING A GIFT WITH STOCK

A charitable gift of stock may provide tax savings while generously supporting one's parish or The Diocese of Ohio. A gift of stock owned for more than one year entitles you to a charitable deduction for the full market value when the gift is made. **It is important to inform the Development and Finance Offices before completing a stock gift transfer.**

To complete a stock gift, follow the directions below or call Christina Butterfield (216-774-0450):

The Diocese will act as agent for a parish receiving a stock gift.
Inform CFO, Christina Butterfield, when you begin the transaction.

1. If your broker holds the stock, instruct your broker in writing of the shares you wish to give. Send a copy of your letter to The Episcopal Diocese of Ohio (details below). Be sure to include your name or the donor's name, address, and phone number.
2. To complete an ELECTRONIC TRANSFER, your broker will need the direct transfer code (DTC) number, which is below. Be sure your broker calls or writes The Diocese Stewardship Office concerning the pending transfer before completing the gift.
3. If you hold the stock certificate, send by registered mail the UNENDORSED CERTIFICATE to the U.S. Bank agent listed below. Include a letter stating that you are giving the stock, the number of shares, to whom and for what purpose.

In a SEPARATE envelope, send a stock power signed exactly as your name appears on the stock certificate to the same U.S. Bank agent. Your broker will help you with this requirement. Separate envelopes ensure that the certificate cannot be stolen and used.

4. Information your broker will need:

The Diocese uses the following firm to complete transfers:

U. S. Bank
Attn: Kelley Adrain, Account Manager
Phone (202) 261-0803 FAX (202) 261-0810
1025 Connecticut Avenue, NW, Suite 517
Washington, DC 20036
WN-DC-WNWW
Kelley.Adrain@usbank.com

Diocesan Account #: 001050972928
Account Name: Episcopal Diocese Legacy Campaign
DTC Code: 2803
IRS Tax ID #: 34-0714658

Christina Butterfield, Chief Financial Officer
The Episcopal Diocese of Ohio
2230 Euclid Avenue, Cleveland, Ohio 44115-2405
Phone: (216) 774-0450; Fax: (216) 623-0735
Email: cbutterfield@dohio.org

*Please, be sure to inform The Episcopal Diocese of Ohio of all pending transfers.
Thank you for your generous gift!*