

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 the Finance Office (216-774-0460):

The Diocese will act as agent for a parish receiving a stock gift.
Inform CFO, Chanin Tyler, 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 informs the Diocese 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
(202) 261-0803
Kelley.Adrain@usbank.com
1025 Connecticut Ave., NW
Suite 517
WN-DC-WNWW
Washington, D.C. 20036

Diocesan Account #: 001050972928

DTC Code: 2803

HWR IRS Tax ID #: 34-0714658

Chanin Tyler, Chief Financial Officer
The Episcopal Diocese of Ohio
2230 Euclid Avenue, Cleveland, Ohio 44115-2499
Phone: (216) 774-0460
Email: ctyler@dohio.org

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