

Making a Gift

St. Anselm Church encourages donors to consult their attorney or financial advisor to ensure that gifts will meet the individual's intentions to support St. Anselm Centennial Campaign as well as his/her financial interests.

Your donation may be made in a number of ways:

Cash, Check or Credit Card

Outright gifts, along with pledges paid over a donor specified period of time, can be made by filling out the enclosed pledge form and, if applicable, credit card authorization.

Non-Cash Donations

Parishioners are encouraged to take advantage of tax laws by donating easily liquidated non-cash items such as appreciated stock, mutual funds and some property. When securities are donated, the market value of the stock at the time the stock is transferred is deductible as a charitable donation. If the donor were to sell the stock outright, capital gains taxes would apply to the increased value of the stock. This method for charitable giving is also useful if the donor has no record of the base cost of the stock for tax purposes and is hesitant to sell the stock because of tax implications.

Stock

Highly appreciated securities, in particular, may offer an outstanding way to give to the Centennial Campaign. They may also provide tax advantages for donors.

Mutual Funds

Contact Mary Connolly of the Archdiocese (415-64-5515).

Gifts of Property

Almost any form of property - real estate, personal property, insurance policies, and business interests, can provide a suitable charitable gift.

Gifts that Provide Life Income

Irrevocable contributions of cash, securities, and other property into a number of planned gift arrangements can provide income to a donor and/or spouse and/or other beneficiaries for a period of time. These types of gifts include: charitable gift annuities, charitable remainder trusts, and charitable lead trusts.

Bequests

Charitable bequests, through a will or a trust, can reduce the size of a taxable estate and may be helpful in estate planning

For more information, please contact:

Pat Langley
St. Anselm Parish Coordinator 415-453-2342 x11

The following pages include a Statement of Intent, Credit Card Authorization; Donating Stock information (2 pages).



Our Journey Today:
Celebrating the Past
Creating the Future

St. Anselm Church
Centennial Campaign

Statement of Intent

In consideration of my/our interest in and commitment to the St. Anselm community, I/we hereby pledge the sum of \$ _____

My pledge will be fulfilled over (1-3) _____ years

Payments will be made:

_____ monthly _____ quarterly _____ semi-annually _____ annually

I/we designate that our donation be applied to:

_____ Greatest Need

_____ Parish Endowment

_____ Parish/School projects

_____ Education Endowment

Proportionally

_____ % to Parish/School Projects _____ % Parish Endowment _____ % Education Endowment

Signature _____ Date _____

Joint Signature _____

Name (please print) _____

Address _____

Phone _____

I would like to make my donation
to the St. Anselm Church
Centennial Campaign
using my credit card.

Print name as it appears on the credit card:

Address:

Phone:

Card Type:

Master Card Visa American Express

Please circle the correct type

Card Number:

Expiration Date:

Signature:

Date:

Transfer Instructions for Stocks or Mutual Fund Donations

For all gifts of stock:

A letter of authorization from the donor to the parish is required. A letter sample is attached. If you have any questions, call Mr. Gene Marty at the number indicated below. FAX copies to Mary Connolly (415-614-5522) and Pat Langley (415-453-8713).

Stock Contributions

A. Using a Broker and Wire Transfers (DTC)

Note: Donor's Broker must initiate transfer.

In addition to the letter mentioned above, please give the following information to the donor broker for transferring to the Archdiocesan broker. (Broker to Broker)

1. **Sloane Investment Advisors**

Attn: Gene Marty
700 Airport Blvd Suite #410
Burlingame, CA 94010
Email: gmarty@sloansecurities.com
Phone: (650) 825-9014
FAX: (650) 931-0661

2. **Investment Capital Advisors' DTC # is 0158**

3. Archdiocesan Account is

926-00319

4. Account Name: **Roman Catholic Archbishop of San Francisco**

(Please note: Although the Account is listed under the Archdiocese of San Francisco the funds are returned to St. Anselm Church.)

5. **Instruct your broker to include the following information on the trailer line (second line) of their transfer instructions:**

FBO (for the benefit of) St. Anselm Church & (Donor Name)

Note: Failure to include the above information for each transfer will delay identifying the donation and could cause us not to acknowledge the donation in a timely manner, as well as cause a delay in having the stock sold.

In addition, a lack of ability to identify the donation within 90 days may cause us to reject the transferred stock.

B. If your donor does not have a broker:

Instruct the donor to deliver the stock certificate and an executed stock power to the parish office.

Or, deliver the stock certificate and an executed stock power form (via registered mail) to Sloan Investment Advisors at the above address. A letter of authorization must accompany the stock certificate and executed stock power.

Mutual Fund Contributions:

Contact Mary Connolly (415-614-5515).

DO NOT transfer Mutual Funds through Sloan Investment Advisors.

Date: _____

Mr. Gene Marty
Sloan Investment Advisors
700 Airport Blvd., Suite 410
Burlingame, Ca 94010

RE: Transfer of stock for the benefit of St. Anselm Church/School

Dear Mr. Marty:

Please accept this as your authorization to deposit _____ shares of
_____ stock into account no. 926-00319,

Roman Catholic Archbishop of San Francisco.

This donation is for the benefit of St. Anselm Parish/School.

This transfer is being made without valuable consideration, and I hereby agree to hold you harmless in this matter.

Sincerely,

Customer Signature

Joint Customer Signature

Phone Number: _____

Fax copy to: Mary Connolly (415-614-5522) and Pat Langley (415-453-8713).