ROMAN CATHOLIC CHURCH OF ST. GERTRUDE

28 School Street

Bayville, NY 11709

Tel. (516)628-1113

Fx. (516)628-9032

#

Church Renovation Campaign

*“Preserve Our Past – Envision Our Future”*

Donation of Securities

Dear Parishioner:

As mentioned in campaign literature, Federal and State laws on income and inheritance taxes encourage charitable giving. All contributions to our campaign are tax deductible. In addition to monetary commitments, your contribution of securities is very much welcome.

The fair market value of securities is deductible and you may not have to pay capital gains on appreciation. As with all tax questions we strongly recommend you check with you tax advisor or attorney to determine actual tax consequences.

Should you wish to donate a portion of your portfolio it is important that you do not sell the stock, bond, etc. It must be transferred to the Parish and sold by the Parish. The transfer needs to be initiated through your broker and can be accomplished by completing the form attached to this memo.

For any questions, or help in accomplishing the transfer don’t hesitate to contact Andy White at 516-607-3635.

Thank you for your generous consideration of this campaign donation!

# St. Gertrude Church

Church Renovation Campaign

*“Preserve Our Past – Envision Our Future”*

Gift of Securities Transfer

DTC Transfer

Please Gift \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Shares/units Security

 From my Account #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

###  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

To:

## Roman Catholic Diocese of Rockville Centre

(in support of the St. Gertrude Church Renovation Campaign)

Brokerage Firm: Charles Schwab

Account # 7586-3723

DTC # 0164

Contact: Maureen Falanga, Diocese of RVC

Phone: 516-678-5800 ext. 517

#### Fax: 516-255-4025

OR

Andy White, Campaign Director

Cell: 516-607-3635

\* Upon Transfer the donor must contact one of the above to confirm receipt of stock/security.