



Catholic Foundation of Michigan

GIFT OF SECURITIES

Thank you for your contribution to the Catholic Foundation of Michigan. The Catholic Foundation of Michigan ensures that your gift responds to the greatest needs in the Catholic community today and into the future. You can trust we are committed to protecting and preserving your charitable interests according to your faith and values.

Making a gift of stock to the Catholic Foundation of Michigan is an easy and tax-effective way to fulfill your Catholic giving goals.

Your gift qualifies for a tax deduction based on the full market value of your stock; plus, if the stock has appreciated in value, you avoid the capital gains tax that would otherwise arise from the sale of this stock.

To make a gift of stock:

1. Contact your broker or financial advisor to transfer a specific number of shares of a named security directly to the Catholic Foundation of Michigan account at the broker listed below. You will need to give your advisor the following information:
 - Firm Name: Merrill Lynch
 - DTC #: 5198
 - CFM Account #: 68904676
 - Account Title: Catholic Foundation of Michigan
2. Please notify the Catholic Foundation of your intended gift. Before a transfer of stock is made, we ask that you please contact Angela with the following information to ensure we track and acknowledge it properly:
 - Your name
 - The name of the publicly traded security you are gifting to the Catholic Foundation of Michigan
 - The number of shares you are gifting
 - The approximate date the gift is being made

If you have any questions, please do not hesitate to contact the helpful Catholic Foundation of Michigan Staff at: info@catholicfoundationmichigan.org or 248-204-0332.