

MAKING DONATIONS OF STOCK TO THE SISTERS OF THE HOLY CROSS

JOIN OUR MINISTRY OF CARING

Sisters of the Holy Cross dedicate their lives to ministering to the sick and the poor and to educating the young. Our sisters' projects around the world, especially those with women and children, are eligible for Ministry With the Poor funding. Your gift now will keep the Ministry With the Poor growing for years to come. Every donation is used to support the projects of the sisters.

You may have been taught to read by one of our sisters, comforted by her while in the hospital, or had her join with you on your spiritual journey. You can say "thank you" by making a donation for our Sisters' retirement needs to provide safe and comfortable care as they continue their ministry of prayer.

Donating stock is one way to make a significant gift while realizing the maximum tax benefits.

GIVING STOCK OR SECURITIES

Donating appreciated stocks that have been held for more than one year can be a wise philanthropic decision. This gift enables you to:

1. make a significant gift to the Sisters of the Holy Cross,
2. receive a charitable donation deduction on your income taxes, and
3. bypass capital gains taxes.

Note: In order for you to receive the full benefit when donating appreciated stock, it is vital that you donate the stock itself—do not sell it first and donate the cash proceeds.

If you have stock losses, reverse the process. Sell the stock, realize the loss and take the deduction on your income tax. Then donate the cash proceeds from the sale and take the charitable tax deduction.

There are three ways to transfer stock to the Sisters of the Holy Cross:

- Electronic Transfer: most popular and efficient way
- Mail the Stock Certificates
- Hand Deliver the Stock Certificates

Note: We strongly recommend that you do not send certificates to a transfer agent for registering in the name of the Sisters of the Holy Cross. It is unnecessary and results in needless delays of the transfer.

ELECTRONIC TRANSFER OF STOCK OR SECURITIES

By using electronic transfer, 100 percent of the value of the stock is transferred versus paying a broker commission. If your stock is held at a broker, notify the broker that you wish to make a gift of securities to the Sisters of the Holy Cross, Inc. (our legal title).

Your broker will need written authorization from you before the transfer can be made. Include the name of the stock, the number of shares you are transferring and your designation for the use of the funds by the Congregation.

After authorizing the transfer, ask your broker to contact the Sisters of the Holy Cross Finance Office at 574-284-5751 for complete transfer instructions.

Note: Transfer instructions change from year to year. Even if you have donated securities in the past, be sure your broker contacts our Finance Office **BEFORE** the transfer is made. We hope to prevent any problems from occurring.

MAILING STOCK CERTIFICATES

For security reasons, this is a two-step process.
Envelope #1: Send your unendorsed stock certificate(s) and a cover letter which includes your name, address and your designated use of the gift in one envelope to our Development Office. Send **REGISTERED MAIL**.
Envelope #2: Send a signed, signature guaranteed, stock power. A stock power can be obtained at your local bank. Send **REGISTERED MAIL**.

Our mailing address is:

Sisters of the Holy Cross
Development Office
407 Bertrand Hall–Saint Mary's
Notre Dame, Indiana 46556-5000

Caution: DO NOT MAIL endorsed stock certificates. Once they are endorsed, they can be exchanged by anyone.

HAND DELIVERY OF STOCK CERTIFICATES

Certificates may be given to any Leadership Team member of the Sisters of the Holy Cross or delivered to:

Sisters of the Holy Cross
Development Office
407 Bertrand Hall–Saint Mary's
Notre Dame, Indiana 46556-5000

FOR MORE INFORMATION CONTACT:

telephone: 574-284-5641

email: development@cscsisters.org