

Types of Giving

Marketable Securities – Transfer ownership of stocks, bonds or mutual fund shares

You receive an immediate income tax deduction for the full fair market value of the securities you transfer. In addition, you pay no capital gains tax on the difference between your cost and the fair market value. Since St. John Vianney is a tax-exempt organization, it does not pay capital gains tax either.

Planned Gifts – Giving retirement assets, bequests, trusts, etc.

There are several types of gifts that may fall under this category, many of which are very simple to make. These include:

Life Insurance: you can simply name St. John Vianney as a beneficiary

Retirement Assets: you can name St. John Vianney as a beneficiary of your IRA, 401(k) or other qualified retirement plans. Any amounts remaining in your plan will transfer to St. John Vianney, free of income and estate tax.

Bequests: you can name St. John Vianney in your will as a beneficiary, and your estate will receive an estate tax deduction for the value of your bequest. A bequest written in a will can be made for a percentage of your estate, a specific dollar amount or for a specific asset, such as stock or real estate.

If you are interested in any of these ways to give, please contact us using the contact information below.

Robb Lied, robbl@stjohnv.org, (262) 796-3940, ext. 1111



Marketable Securities

There are 2 steps needed to give marketable securities to St. John Vianney:

Step 1: Initiate the Transfer

You or your broker may electronically initiate the transfer of shares to either of the St. John Vianney brokerage accounts. Use the following information in order to deliver your securities:

Brokerage: Wells Fargo
Contact: Michelle Anderson
Phone: 262-798-3770
Account Name: St. John Vianney
Account #: 5885-1959
DTC #: 0141

Brokerage: Baird
Contact: Hoch Haldemann Group
Phone: 414-765-3681
Account Name: St. John Vianney
Account #: 7963-8873
DTC #: 0547

Step 2: Notify St. John Vianney

In order for your contribution to be attributed to the correct fund, notifying us of this information will help us serve you better. Please provide the following information by email or phone:

- Donors full name and address
- Name of security and number of shares transferred
- Date of transfer
- Name of the fund you would like these securities to go toward (i.e. Offertory)

Notify: Robb Lied, robbl@stjohnv.org, (262) 796-3940, ext. 1111