**Securities Donation Instructions**

One tax-advantaged way for a donor to give a gift to St. Lawrence, is to donate appreciated securities.

Giving stocks, bonds, and mutual fund shares that have increased in value (and which the donor has owned for more than one year) provides donors with greater tax benefits than giving cash. Not only can the donor deduct the full market value of the securities but also avoid paying capital gains tax on the appreciation.

**Step 1: Transfer shares held at a securities firm or other brokerage account**

* + Provide the following instructions to your financial advisor or the institution where securities are held to transfer the shares to:

**Charles Schwab**

**DTC # 0164  
Code#: 40**

**Account # 4577-5100**

**Account Name: ST LAWRENCE CENTER FOUNDATION**

* + Instruct your broker to enter identifying information (i.e. your name and address, phone number, account number, broker information) into the "Text Comment" field of the DTC screen.
  + If you would like to transfer shares of mutual funds, please contact Timothy Larson at 913.303.4341 or [timothy.larson@creativeplanning.com](mailto:timothy.larson@creativeplanning.com) to make certain that the shares can be accepted.

**Step 2: Notify St. Lawrence of your Gift**

Securities donations often transfer with no accompanying donor information. In order for St. Lawrence to identify your gift and send a tax receipt, please provide St. Lawrence with the gift details requested below:

* Donor Name
* Donor Address
* Donor Phone
* Donor E-mail
* Name and Type of Security
* Number of Shares
* Approximate Transfer Date
* Name of Brokerage Firm

E-mail the form to the attention of Molly McKeithan at mMcKeithan@kucatholic.org.