



Donating Stock

Giving a Few Shares

Donating long-term appreciated securities directly to the Diocese of Sioux City— rather than selling the assets and donating the cash proceeds — is one of the best and easiest ways to give more. By taking advantage of the applicable tax incentives, you can significantly increase the amount of funds available for your charitable giving. A donation of appreciated stock allows you to avoid capital gains on the appreciated value of the stock while receiving a charitable donation for the total value of the stock donated to the Diocese of Sioux City. **It is a win-win for everyone!**

How Does It Work?

- ◆ Donor or broker notifies the Diocese of Sioux City of his/her intent to donate stock. Notification can be done via telephone, e-mail or fax.
- ◆ Donor or broker initiates transfer of the stock and to obtain Diocesan account information for transfer.
- ◆ The Diocese of Sioux City assumes ownership of the stock and sells it for market value.
- ◆ The donor does not recognize the gain from the sale of the stock for federal or state income tax purposes.
- ◆ Donor receives appreciated stock value for the donation of the stock as a charitable donation for federal tax purposes.

Need More Information? Contact the Diocese of Sioux City:

(712) 233-7548 † www.scdiocese.org † jessicaw@scdiocese.org

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