

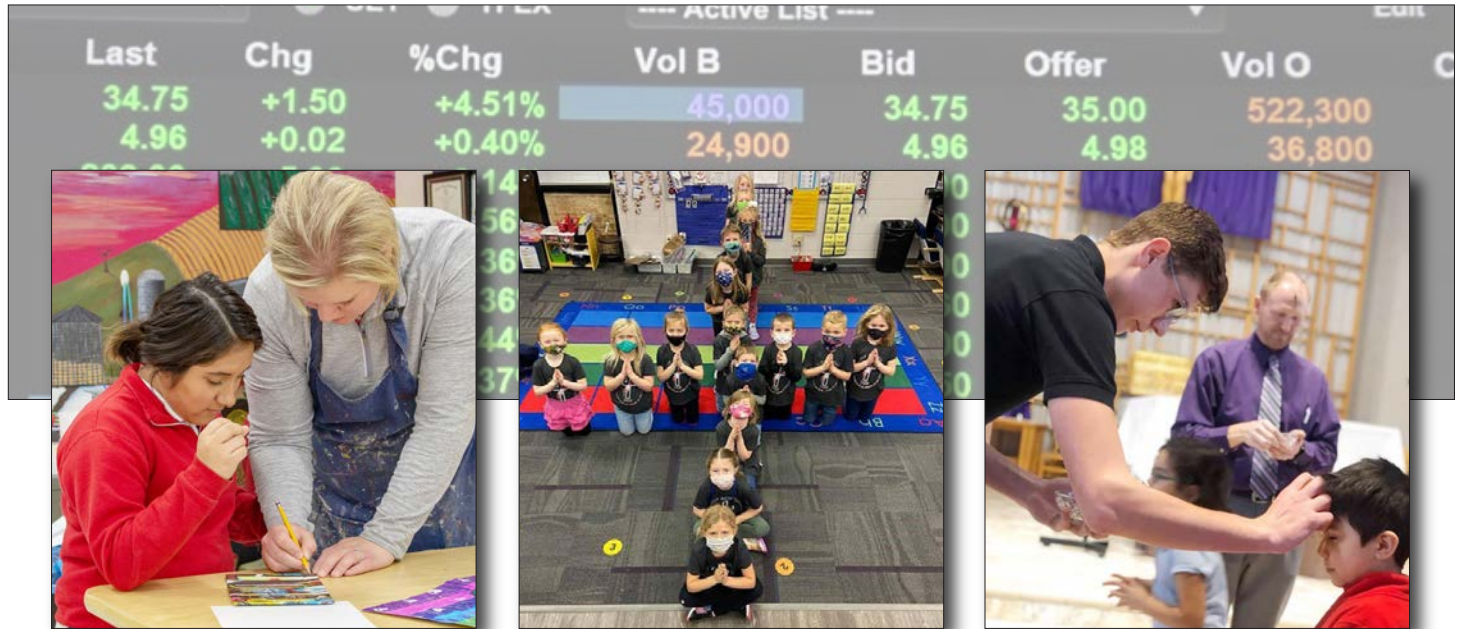


Monsignor Lafferty Tuition Foundation

Gift of Stock Shares

Significant benefits from appreciated stock holdings

Stock donations are being accepted *now* for the 2022 Msgr. Lafferty Tuition Foundation (MLTF) campaign. Again this year, enjoy a 75% state of Iowa tax credit of the current value of your stock donation.



Donors avoid gains from the sale of the appreciated stock for federal or state income tax purposes – no capital gains taxes.

Donors receive the benefit of 75% in state of Iowa tax credits of the stock value at the time of the gift. (Check with your tax advisor regarding your situation.)

How do I gift stock to MLTF?

Before you initiate a transaction, contact Jessica Wilcox at (712) 233-7565 or jessicaw@scdiocese.org to notify us of the intended donation.

We will provide the MLTF account information to you or your broker to initiate the transfer of the stock to MLTF.

After the transfer, MLTF owns the stock and will sell it at the market value. (Donor does not initiate the sale of the stock.)

The appreciated stock value qualifies as a charitable donation for the donor's federal tax purposes.

Thank you for helping provide a Catholic choice in education for our families.



DIocese
OF SIOUX CITY

1821 Jackson St., P.O. Box 3379
Sioux City, IA 51102

(712) 255-7933

www.scdiocese.org