

## DONATING STOCK TO GUARDIAN ANGELS PARISH

For many parishioners there are favorable tax advantages for donating appreciated stock to Guardian Angels Parish. By transferring appreciated stock directly to Guardian Angels the donor not only may take a deduction for the value of the stock but also avoid the capital gains tax. Please consult your tax professional to make sure that this applies to your specific circumstances.

### How is stock given?

#### Electronic Transfer (DTC)

1. Instruct your broker to transfer (not sell) the stock directly to the Guardian Angels account at UBS Financial Services. The transfer information is as follows:

- DTC #0221  
UBS Financial Services  
Account # WL 10376  
FBO Guardian Angels

2. Complete the attached Notice of Stock Donation and send it to (addresses on form):

- Tim Donovan, Vice President, Investments  
UBS Financial Services
- Bill Moller, Business Manager  
Guardian Angels Parish

#### Share Certificate Transfer

1. The donor signs the back of the stock certificates or an authorization form provided by the broker.
2. Complete the attached Notice of Stock Donation and have your broker send it and the stock certificates via registered mail to:

- UBS Financial Services  
FBO Guardian Angels  
C/O Tim Donovan  
8044 Montgomery Road, Suite 200 W  
Cincinnati, Ohio 45236-2926

3. Have your broker FAX the Notice of Stock Donation to:

- Bill Moller  
Guardian Angels  
FAX (513) 231-0683

**What Happens?**

1. UBS Financial Services has been instructed to sell donated shares as soon as possible.
2. Guardian Angles will send the donor an acknowledgement letter.

We thank you in advance for your gift and support. If you have any questions, please call Bill Moller, Business Manager, at (513) 624-8961.

**NOTICE OF STOCK DONATION**

To: Bill Moller, Guardian Angels Parish, 6531 Beechmont Ave., Cincinnati, OH 45230; FAX (513)231-0683; email [bmoller@gaparish.org](mailto:bmoller@gaparish.org)

To: Tim Donovan, UBS Financial Services, 8044 Montgomery Road, Suite 200 W, Cincinnati, OH, FAX (855) 396-1184; email [timothy.donovan@ubs.com](mailto:timothy.donovan@ubs.com)

From: \_\_\_\_\_

Date: \_\_\_\_\_

This serves as notice that I have transferred \_\_\_\_\_ (number) shares of \_\_\_\_\_ (name or symbol) stock from my \_\_\_\_\_ (name of firm) brokerage account to:

- UBS Financial Services  
FBO Guardian Angels Church  
Account # WL 10376 DN  
DTC # 0221

Sincerely,

Donor Signature (s): \_\_\_\_\_

Donor Printed Name(s): \_\_\_\_\_

Donor Street Address: \_\_\_\_\_

Donor: City, State, and ZIP: \_\_\_\_\_

Donor Phone Number: \_\_\_\_\_