

## **Consider potentially avoiding a tax liability and support St. Leo the Great Catholic School**

Please consider making a charitable donation to St. Leo the Great Catholic School and reduce your tax liability by donating a highly appreciated asset

Potential Benefits to Making a Stock Donation:

1. Capital gains taxes can be avoided by donating to St. Leo the Great Catholic School
2. If you have owned the stock for over 1 year, you can personally deduct the full fair market value of the stock
3. If you itemize your charitable tax donations on your Federal income taxes, your donation can be itemized
4. Up to 30% of your AGI may be used for your deduction and then used thereafter for up to 5 years

How to Donate

To make a broker-to-broker transfer, your broker needs the following written instructions:

Diocesan Broker: Portsmouth Financial Services

Account Manager: Walter J. Bankovitch

Broker Address: 250 Montgomery Street, Ste 200 San Francisco, CA 94104

DTC # 0443

Account Number at Portsmouth Financial Services 6PH105792

Taxpayer ID# 94-2734503

Portsmouth Financial Services Phone Number (415) 543-8500

Once the Stock Has Been Transferred

1. Please send written instruction to the Diocese of San Jose that you want the stock donation to go to St. Leo the Great Catholic School (address below)
2. In the same letter, please identify yourself, give your mailing address, and once again indicate St. Leo the Great Catholic School
3. In the letter, also indicate the exact amount of shares and the type of stock that your broker transferred
4. Please send of copy of the letter to St. Leo the Great Catholic School (Attn: Jennifer Lozzio)

Department of Financial Services

Diocese of San Jose

1150 North 1<sup>st</sup> Street, Suite 100

San Jose, CA 95112

Fax: (408) 983-0296

