



*Lord, Renew
Your Church*

Instructions for Making a Gift of Stock or Mutual Funds

Electronic Transfer of Your Stock or Securities

- Instruct your broker or commercial banker to transfer the shares of stock to:
 - Robert W. Baird & Co.
 - Baird Private Wealth Management
 - DTC # 0547
 - Brokerage Account Number: 77028925
 - Account Name: The Archdiocese of Saint Paul and Minneapolis – Lord, Renew Your Church
- In addition to instructing your brokerage firm to wire securities, please send an email to lordrenewyourchurch@archspm.org with the following information:
 - Donor's name and address for tax receipt letters
 - Stock or fund name and ticker symbol-
 - Number of shares
 - Expected date of transfer
 - A statement saying that the gift is to benefit Lord, Renew Your Church

Physical Transfer of Your Stock or Securities

- **Assign and endorse (see below) the stock certificate and send by insured mail to:**

The Archdiocese of Saint Paul and Minneapolis – Lord, Renew Your Church
PO Box 7118
Kensington, CT 06037-9924
- Federal Tax ID: 41-0693908
- Endorsement on back must be **exactly** as registered on front of stock certificate.
- Donor must obtain a Medallion Signature Guarantee from your broker or commercial banker.

Contacts

Baird Wealth Management

Lynn L. Kittleson
651-365-2184

Archdiocese of Saint Paul and Minneapolis

Office of Accounting Services
Stephanie Jerstad
Controller
651-290-1640

Melanie Sandoval, Office of Mission
Advancement: sandovalm@archspm.org or
651-291-4540

NAICS - 813110 Religious Organization

EMAIL - lordrenewyourchurch@archspm.org



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Instructions for Making a Qualified Charitable Distribution (QCD) from an IRA

Donors who are 70-1/2 years and older can make a Qualified Charitable Distribution (QCD) from their IRAs to an eligible non-profit organization, like the Archdiocese of Saint Paul and Minneapolis. By federal law, QCDs up to a maximum of \$108,000 per year can avoid taxation.

To make a QCD from an IRA:

- 1. Donors must advise their IRA administrator of their intent** to make a Qualified Charitable Distribution (QCD) to the Archdiocese of Saint Paul and Minneapolis **and specify the amount they wish to donate.**
- 2. The IRA administrator will prepare a check** for the QCD payable to the “Archdiocese of Saint Paul and Minneapolis” and send it to:

Archdiocese of Saint Paul and Minneapolis
PO Box 7118
Kensington, CT 06037-9924

- 3. Donors should notify Melanie Sandoval, Office of Mission Advancement** forthcoming gift at sandovalm@archspm.org or 651-291-4435 and include your parish, the amount of the gift, and the issuing entity.

Please Note:

- Some IRA Administrators mail QCD checks to the donors directing the gift.** In this case, donors should forward QCD checks to the Archdiocesan address listed above for processing.
- QCD gifts are acknowledged with a special letter** that confirms the Archdiocese's eligibility to receive QCDs and that no goods or services were provided in exchange to the donor.
- By federal law, individuals 73 years old and older are required to take a specific amount from their IRA each year.** This Required Minimum Distribution (RMD) is taxable. QCDs may come from the donor's RMD.
- Some IRA accounts require an additional step in the above process.** The IRA Administrator will advise what the donor needs to do.

Please contact the campaign office with any additional questions at lordrenewyourchurch@archspm.org or 651-251-7700. This information is not intended as legal, accounting or other professional advice. For assistance in gift planning, please consult an attorney and financial advisor.