

Catholics United for the Poor Gifts of Stock

You can help Catholics United for the Poor (CUP) by donating appreciated stock. Gifting in this manner allows you to avoid paying capital gains tax on the increase in the value of the stock and you receive an income tax deduction for the full market value of the stock on the date of the gift. By subtracting the tax savings from what you originally paid for the stock it can result in a gift that costs just pennies on the dollar. This is an excellent option for stock that has appreciated substantially in value.

There are two easy ways to donate stock to CUP:

Work through Your Broker

Your broker may transfer stock to CUP's MorganStanley SmithBarney account (account information below) or, if you also have an account with MorganStanley SmithBarney, your broker may make an in house transfer from your account to CUP's.

Please advise your broker to contact CUP prior to the transfer to allow us to give your gift our prompt attention in acknowledging it for tax purposes.

CUP broker: MorganStanley SmithBarney
William T. Allred
7755 Montgomery Road, Floor 2
Cincinnati, OH 45236
513-762-5293

CUP's Tax ID: 31-1150882

Contact information: Catholics United for the Poor
P.O. Box 14548
Cincinnati, OH 45250
Phone 513-471-4990/Fax 513-471-3275
Email: cup@cupcincy.org
www.cupcincy.org

Transfer Stock Certificates

To transfer stock certificates directly, you must have a stock power for each certificate. The signatures on these stock powers must be guaranteed. Your local bank or broker can witness your signature and stamp the stock power.

Once you have signed the stock powers (do not sign the backs of the certificates), please put the certificates in one envelope and the signed stock powers and signature guarantee in another. Send both envelopes to:

Catholics United for the Poor
PO Box 14548
Cincinnati, OH 45250

Thank you for considering a stock donation to CUP!