



## Archdiocese of Omaha

### Tax-favored Charitable Gifts

In order to make a charitable gift in 2020 for Federal Income Tax purposes, you must make your gift before December 31, 2020. There are many ways to make a charitable gift to a qualified organization, such as the Archdiocese of Omaha, and we have summarized two (2) tax advantaged options below.

#### IRA Charitable Rollover

You may be looking for a way to make a big difference to help further the mission of the Church. If you are 70½ or older, an IRA charitable rollover is a way you can help continue our work and benefit this year.

##### *Benefits of an IRA charitable rollover*

- Avoid taxes on transfers of up to \$100,000 from your IRA to the archdiocese, your parish or school
- Make a gift that is not subject to the deduction limits on charitable gifts
- Help further the work and mission of our Church

##### *How an IRA charitable rollover gift works*

- Contact your IRA plan administrator to make a gift from your IRA to our Church
- Your IRA funds will be directly transferred to our Church to help continue our important work
- Please note that IRA charitable rollover gifts do not qualify for a charitable deduction

#### Gift of Stock

A gift of long term appreciated publicly traded stock may entitle the donor to an income tax charitable deduction for the fair market value of the stock on the effective date of the gift and also avoid capital gains tax. In many cases it is more advantageous for a donor to donate the securities to a qualified organization than to sell the securities and donate the cash proceeds. However, we recommend that you consult your tax advisor for additional information.

##### *To transfer stock to the Archdiocese of Omaha:*

1. Instruct your broker to transfer shares of stock to the Archdiocese of Omaha using the following information:

*Broker:*  
Morgan Stanley

*Contact:*  
Cathleen Morrison (402.399.6194)

*Address:*  
13625 California Street, Suite 400  
Omaha, NE 68154

*DTC Number:*  
0015

*Account Number:*  
361-109843

*Account Name:*  
Catholic Archbishop of Omaha Inc.

*Federal Tax ID (EIN):*  
47-0376538

2. Contact Darrel Giesbrecht, Data Support Office, at 402.558.3100, or email him at [djgiesbrecht@archomaha.org](mailto:djgiesbrecht@archomaha.org), to ensure the archdiocese is aware of your pending stock transfer.

Upon receipt of the transfer, we will issue a stock transfer receipt to you. The gift is valued as the fair market price of the stock on the day of the transfer.

Please contact the Stewardship and Development Office with any questions at 402.557.5650. Thank you.