



Archdiocese of Omaha

2022 Giving Guide

Your commitment to the archdiocese impacts our brothers and sisters across all 23 counties of northeast Nebraska. Thank you for your generous support.

We hope the guide below will be of assistance to you when making decisions about charitable gifts. Please reach out to the Stewardship and Development Office with any additional questions at 402.557.5650.

Tax-favored Charitable Gifts

To make a charitable gift in 2022 for Federal Income Tax purposes, you must make your gift **on or before December 31, 2022**. There are many ways to make a charitable gift to a qualified organization, such as the Archdiocese of Omaha, please find a summary of tax advantaged options and how to make a gift to the Archdiocese of Omaha below.

Make a Qualified Charitable Distribution (QCD) of Individual Retirement Account (IRA) assets

If you are 70½ or older, a QCD charitable distribution is a way you can support the work of the Church.

- *Benefits of a QCD charitable distribution*
 - Avoid taxes on transfers of **any amount** 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 the Church
- *How a QCD charitable distribution gift works*
 - Contact your IRA plan administrator to make a gift from your IRA to the Church
 - Your IRA funds will be directly transferred to the Church to help continue our important work; they must be directly transferred from your IRA to the charitable organization to count as a Qualified Charitable Distribution
 - Please note that IRA charitable rollover gifts do not qualify for a charitable deduction, but they can count as all or part of your required minimum distribution

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. If you have stocks that have lost value, but you still wish to use them to make a donation, they should be sold first and then the proceeds donated. However, we recommend that you consult your tax advisor for additional information.

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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 / djgiesbrecht@archomaha.org, or the Stewardship & Development Office at 402.557.5650 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 average of the high and low market price of the stock on the day of the transfer. Please note that the entire transfer process can take several business days.

To make a gift online

Visit the Archdiocese of Omaha online giving site at <https://archomaha.org/appeal/>

- Gifts made before midnight on December 31, 2022, are counted in the 2022 tax year.

To make a wire transfer

Contact the Stewardship & Development Office at 402.557.5650 for banking information, including account and routing numbers.

To mail a gift via USPS

Ensure the gift is postmarked by December 31, 2022

Archdiocese of Omaha
2222 N. 111th Street
Omaha, NE 68164

- If you are mailing your gift on December 31, do not drop your gift in a mailbox, but take it into the post office to ensure it is postmarked December 31, 2022.

To make a gift over the phone

Call the Archdiocese of Omaha Data Support Office by 12 p.m. CST on Friday, December 30, 2022, at 402.558.3100. If you are unable to call on or before 12 p.m. CST on Friday, December 30, 2022, please make your gift online at <https://archomaha.org/appeal/>.

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

Thank you for your prayerful consideration and generosity impacting all in our archdiocese.