



# Our Faith, Our Children, Our Future School Tuition Organization

PO Box 479 Dubuque, IA 52004  
[www.OurFaithSTO.org](http://www.OurFaithSTO.org)

## Instructions for contributing stocks to Our Faith, Our Children, Our Future School Tuition Organization

A contribution of common stock to the STO program is a win-win situation. Please follow the steps below to insure that your contribution of stock is received and applied correctly. Before initiating a stock transfer please verify with our office at 319-261-1031 that tax credits are still available

### Step 1: Transfer Stock:

A. If stocks are held in “street name” in a brokerage account, complete the top portion of Attachment I (*your broker may require that you use a specific form that they provide to initiate a stock transfer*) and direct your broker/dealer to transfer the contributed stock to the following account:

- PrimeVest Financial Services, Inc., DTC#0701, Account Number 63851117, FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa

Or if your stock is held at one of the following brokers then you may transfer to one of the following accounts:

- A.G. Edwards, Account Number 7006-9391, FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa
- RSM McGladrey Charles Schwab, Account Number 7443-8622, FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa
- Edward Jones, Account Number 977-12680-1-9, FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa

B. If stocks are held in certificate form, on the back, you assign the certificate to the *Our Faith, Our Children, Our Future School Tuition Organization*, and sign and date at the bottom. Please also complete the bottom portion of Attachment I and deliver it with the stock certificate(s) to the Finance Office at the Archdiocese of Dubuque Pastoral Center; 1229 Mt. Loretta Ave, Dubuque, IA 52004.

### Step 2: Please complete Attachment II and an STO Donor Form and mail or fax it to:

Our Faith, Our Children, Our Future STO    Or    Fax: (563) 556-5464  
PO Box 479  
Dubuque, IA 52004-0479

Within 30 days of receipt of the stock into our account (or receipt of Attachment II, if later), we will send you an acknowledgment that complies with IRS regulations.



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## Attachment I

### For Electronic Transfers – Notice to Broker

I hereby authorize you to transfer \_\_\_\_\_ shares of \_\_\_\_\_ stock held in my brokerage account # \_\_\_\_\_, as follows:

Transfer to (Check One):

- \_\_\_\_\_ PrimeVest Financial Services, Inc., DTC#0701, Account Number 63851117, FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa
- \_\_\_\_\_ A.G. Edwards, Account Number 7006-9391, FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa
- \_\_\_\_\_ RSM McGladrey Charles Schwab, Account Number 7443-8622, FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa
- \_\_\_\_\_ Edward Jones, Account Number 977-12680-1-9, FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa

Your prompt attention is appreciated.

Sincerely,

Print Name(s) \_\_\_\_\_

Signature(s) \_\_\_\_\_

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### For Gifts of Physical Stock Certificates – Letter of Intent

I hereby donate \_\_\_\_\_ shares of \_\_\_\_\_ stock to the *Our Faith, Our Children, Our Future STO*.

Sincerely,

Print Name(s) \_\_\_\_\_

Signature(s) \_\_\_\_\_



**Our Faith, Our Children, Our Future**  
**School Tuition Organization**

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**Attachment II**

**Notice of Stock Gift to *Our Faith, Our Children, Our Future STO***

**Mail or fax this page to:    *Our Faith, Our Children, Our Future STO***  
**PO Box 479**  
**Dubuque, IA 52004-0479**  
**Or**  
**Fax: (563) 556-5464**

Donor Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Quantity & Stock Donated: \_\_\_\_\_

\_\_\_\_\_

How donated:

Electronically: \_\_\_\_\_ Certificate(s) delivered to Finance Office at Pastoral Center: \_\_\_\_\_

If electronically, donor's broker/agent: \_\_\_\_\_

Broker/Agent's telephone: \_\_\_\_\_

Date of gift: \_\_\_\_\_