



Our Faith, Our Children, Our Future
School Tuition Organization
PO Box 479 • Dubuque, IA 52004-0479
(563) 556- 2580 • www.OurFaithSTO.org

Stock Contribution Instructions

Updated 10/13/16

OVERVIEW

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 (563) 556-2580 ext. 219 that tax credits are still available.

STEP ONE

Failure to submit Attachment I with the Donor Form may result in ineligibility for the Iowa Tax Credit

- Complete Attachment I (found online or on the back of this paper) and the STO Donor Form and mail to:

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

- If Attachment I and the STO Donor Form are not received within 14 days of the stock transfer your gift may not be eligible for an Iowa Tax Credit. Please contact Jeff Schneider at Jeff.Schneider@DbqArch.org or (563) 556-2580 ext. 219 with questions.

STEP TWO

- If stocks are held in "street name" in a brokerage account direct your broker/dealer to transfer the contributed stock to the following account:

- **Cetera Investment Services LLC**

DTC#0701, Account Number 2FH00932

FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa

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

- **Wells Fargo Advisors**, 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

- **The Vanguard Group**, Fund number 552, Account Number 88100215199, 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, sign and date at the bottom and deliver them to the Finance Office at: The Archdiocese of Dubuque Pastoral Center at 1229 Mt. Loretta Ave, Dubuque, IA 52004

If you have questions regarding your gift, please contact Jeff Schneider, Associate Development Director for the Archdiocese of Dubuque at (563) 556-2580 x219 or Jeff.Schneider@DbqArch.org



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Attachment I

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NOTICE OF STOCK GIFT TO OUR FAITH, OUR CHILDREN, OUR FUTURE STO

Mail this page to: Our Faith, Our Children, Our Future STO
PO Box 479
Dubuque, IA 52004-0479

or

Fax this page to: (563) 556-5464

DONOR CONTACT INFORMATION

Donor Name: _____

Address: _____

Phone: _____

**Quantity & Stock
Donated:** _____

DONATION PROCESS

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

If electronically, donor's
broker/agent: _____

Broker/Agent's
telephone: _____

Date of gift: _____

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for the Archdiocese of Dubuque at (563) 556-2580 x219 or Jeff.Schneider@DbqArch.org**