



# Our Faith, Our Children, Our Future

## School Tuition Organization

PO Box 479 • Dubuque, IA 52004-0479  
(563) 556- 2580 • [www.OurFaithSTO.org](http://www.OurFaithSTO.org)

<b>OFFICE USE ONLY</b>	12-18
Date Received:	_____
DWID:	_____
TCC #:	_____
MKTC:	<b>STOWEB</b>
PT:	_____

### TAX CREDIT INFORMATION

By law, tax credits may only be issued to one individual per donation.

Taxpayer Name: \_\_\_\_\_

Taxpayer SSN / EIN (required): \_\_\_\_\_

If Business: Corporation Type: \_\_\_\_\_ Tax Yr End Date: \_\_\_\_\_

If Memorial, List Details: \_\_\_\_\_

I wish my donation to remain anonymous.

### GIFT INFORMATION

Total Gift Amount: \$ \_\_\_\_\_  Check Enclosed *Make check payable to: Our Faith STO*

Credit Card:  MasterCard  VISA  Discover  American Express

Card Number: \_\_\_\_\_

Expiration: \_\_\_\_\_ CSV #: \_\_\_\_\_ Signature: \_\_\_\_\_

I plan to give stock. *See reverse side for instructions on gifts of stock.*

I plan to give grain. *Before beginning the transfer process please contact Jeff Schneider at 563-556-2580 x219.*

I plan to give a Qualified Charitable Distribution (QCD) from my IRA.

### TAXPAYER CONTACT INFORMATION

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_

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

### FINAL STEPS

Mail your contribution with this completed form to:

**Our Faith STO: PO Box 479 Dubuque, IA 52004-0479**

- Tax credits are awarded on a first come, first served basis.
- Contributions must be postmarked by **12/31/19** to be eligible for a 2019 tax credit.
- In the event the tax credit limit has been reached when this gift is received, your gift will be promptly returned.
- If you have set up a recurring gift, your consolidated receipt will be mailed at the end of the calendar year.

*It is important to note that donor requested restrictions to specific school(s)/system(s) are subject to the following STO regulations. Up to 50% of gifts may be restricted to school(s)/system(s) as designated. The Contributor understands and agrees that if a school/system designated for a restricted contribution does not have one or more students who are eligible to receive tuition assistance under the law's requirements or all eligible students have received the maximum assistance set by the STO board so as to permit for the full use of the requested contribution, the contribution, or the unused portion thereof, will be used for tuition assistance for qualifying students at any of the STO schools/systems. There are no appeals.*

### GIFT DESIGNATION

I hereby direct **100%** of this contribution be deposited in the STO's unrestricted fund.

I hereby direct **50%** of this contribution to provide tuition assistance to students attending school(s)/system(s) listed below. (Please circle.)

*Please note that unless you have marked the anonymous box, your name and the amount of your donation that was restricted will be shared with the administrator of the school(s) designated.*

### RESTRICTED CONTRIBUTION DESIGNATIONS

1	Ames, St. Cecilia	20	Gilbertville, Raymond Bosco
2	Anamosa, St. Patrick	21	Guttenberg, St. Mary
3	Bellevue, Marquette	22	Holy Cross, LaSalle
4	Calmar, Ossian, Spillville St. Teresa	23	Independence, St. John
5	Cascade, Aquin	24	Jesup, St. Athanasius
6	Cedar Falls, St. Patrick	25	Manchester, St. Mary
7	CR, All Saints	26	Maquoketa, Sacred Heart
8	CR, Holy Family	27	Marion, St. Joseph
9	CR, St. Matthew	28	Marshalltown, St. Francis
10	CR, St. Pius X	29	Mason City, Newman Catholic
11	CR, Regis MS	30	Monticello, Sacred Heart
12	CR, Xavier HS	31	New Hampton, St. Joseph
13	Charles City, Immaculate Conception	32	Oelwein, Sacred Heart
14	Cresco, Notre Dame	35	Protivin, Trinity Catholic
15	Decorah, St. Benedict	36	Waterloo, CVCS
16	Dubuque, Holy Family	37	Waukon, St Patrick
17	Dyersville, St. Francis Xavier	38	Waverly, St. Paul's Lutheran
18	Dyersville, Beckman	39	Webster City, St. Thomas Aquinas
19	Farley, Peosta Seton Catholic		

### IMPORTANT REMINDERS

- If sending your contribution after October 1, 2019 **please check the website or call to see if credits are available.** Credits are limited and awarded on a first come, first served basis.
- IRA and stock contributions **must be made on or before December 1, 2019** (assuming tax credits avail.).
- To qualify as a Qualified Charitable Distribution (QCD) that satisfies your RMD requirement, you must be 70½ at the time the gift is made.

If you have questions regarding your gift, please contact **Jeff Schneider, Associate Development Director** at  
(563) 556-2580 x219 or [Jeff.Schneider@dbqarch.org](mailto:Jeff.Schneider@dbqarch.org)

# Stock Contributions

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.** Failure to submit both the stock form below and the STO donor form may result in ineligibility for the Iowa Tax Credit.

• If the form below 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](mailto:Jeff.Schneider@DbqArch.org) or (563) 556-2580 ext. 219 with questions.

• 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

• **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

• **Fidelity Investments**, Account Number Z50-532436

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

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  
1229 Mt. Loretta Ave, Dubuque, IA 52004**

## 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 the Pastoral Center)*

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

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

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

**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](mailto:Jeff.Schneider@DbqArch.org)**