

How to Give Stock or Mutual Fund Gifts and Gifts from IRAs

Transfer Information for gifts of stock or mutual funds –

Provide this information to your broker or mutual fund company:

Account Name: Anthony B. Taylor as Bishop of Catholic Diocese of Little Rock

Tax ID: 71-0236871

Account Number: 555-026387-138

DTC Number: 0015

Receiving Firm and Contact: Morgan Stanley –

Tracy Speed – 501-221-6380 tracy.speed@morganstanley.com

Important: Please click on the link below to complete the online form before transferring the securities so that we can identify and properly place your designated gift.

https://forms.zohopublic.com/DOLR/form/StockGiftIntentForm/formperma/CFN-x2_sNZ9ZPw42mlj01ipESQ75pW-s62pwSJ6oPIU

IRA Qualified Charitable Distribution gifts –

If you are 70 ½ years or older, you may make a Qualified Charitable Distribution (QCD) from your IRA to your parish, school or other church ministry without paying federal income tax. The funds transferred will count toward your Required Minimum Distribution (RMD) and will not count as taxable income. Your disbursement must come directly from the administrator of your IRA to the diocese.

For this example, assume your required minimum distribution (RMD) for the year is \$25,000, which you are required to take by December 31.

You make a \$25,000 qualified charitable distribution (QCD) to the Diocese of Little Rock designating your gift to be split with \$15,000 going to your parish, \$5,000 to Catholic Arkansas Sharing Appeal and \$5,000 to the Clergy Welfare Fund.

Your gift satisfies your \$25,000 RMD for the year and the tax benefit you receive comes from the \$25,000 that is excluded from your annual gross income.

Provide this information to your IRA administrator:

Catholic Diocese of Little Rock

Tax ID: 71-0236871

Attn: Stewardship and Development Office

2500 N. Tyler St.

Little Rock, AR 72207

Important: Please click on the link below to complete the online form so that we can properly credit your designated gift.

https://forms.zohopublic.com/DOLR/form/IRAQualifiedCharitableDistributionQCDLetterofInten1/formperma/NljcTlolZXLZ5nY-J_nUFJ6eOOP3bNlkrLbeyYnCOYE