

Making a Year-End Gift To St. Mary's Chinese Schools and Center

**Charitable gifts made by midnight on December 31st can result in
tax savings when you file your taxes next Spring!**

Donating long-term appreciated securities such as stocks, bonds, or mutual funds often brings you greater tax saving than donating cash. Now may be the best time for gifts of stock made outright to accelerate a pledge and avoid capital gains tax while realizing the tax savings as a result of the donation.

How can I make a stock gift?

The easiest way to donate stock is to electronically transfer shares into our account at Piper-Jaffray Securities, Inc. In addition to being convenient, this method minimizes market fluctuations because of the speed of the transfer, which allows you to maximize your gift to St. Mary's Chinese Schools and Center.

1. **Call your broker** and instruct your agent to electronically transfer shares to the St. Mary's Piper-Jaffray Securities, Inc. account.
2. **Delivery instructions** -- Please include the following information on the trailer line (second line) of transfer instruction: DTC 311, Account #7926-9610

Agent:
Piper-Jaffray
Mr. Michael Torrey
345 California Street, Suite 2200
San Francisco, CA 94104
415.984.3633 or 1.800.247.7834
415.984.3601 (fax)

Credit to:
"The RC Archbishop of SF,
a Corporation sole, for the benefit of
St. Mary's Chinese Mission Building Fund"
Account # 7926-9610

3. Simply **notify us** of the donation and date of transfer – we'll do the rest! Call 415.929.4696. You may also mail certificates.

How can I make a cash gift?

1. Send your **check**, payable to *St. Mary's Chinese Schools and Center*, to:

Capital Campaign Office
St. Mary's Chinese Schools and Center
910 Broadway
San Francisco, CA 94133

2. **Call** 415.929.4696 to make a pledge, ask questions, or make other payment arrangements.

Keep all gift acknowledgements for your records. Gifts valued at \$250 or more must have a receipt from the charitable organization. Failure to keep acknowledgements may result in the disallowance of your deduction.

Thank you for including St. Mary's Chinese Schools and Center in your year-end charitable considerations!

St. Mary's Chinese Schools and Center is not engaged in rendering legal or tax advisory service. The purpose of this information is to provide accurate and authoritative information of a general nature. For advice and assistance in specific cases, the services of an attorney or professional advisor should be secured. Advice from legal counsel should be obtained when examining these types of charitable donations. Watch for tax revisions.