



*“Go and Announce
The Gospel of the Lord.”*

Fulfilling Your DSA Pledge Through a Gift of Stock

Thank you for your support of the Diocesan Services Appeal! You can make your DSA gift or fulfill your pledge through the direct transfer of stock to The Catholic Foundation. Your broker will need the following information to successfully transfer your gift of stock. Please remember to ask your broker to note your name and your parish name on the transfer instructions. *

Receiving Broker

Morgan Stanley, Perrone Lewis Group
2900 West Road, Suite 300
East Lansing, MI 48823

Contacts at Morgan Stanley

Joseph Perrone/Jennifer Edwards
517.324.8008 or 800.248.0487

Account Information

Name: The Catholic Foundation of the Diocese of Lansing
DTC #: 0015
Account #: 395-015775-043
Federal Tax ID #: 81-2025056

Contacts at The Catholic Foundation of the Diocese of Lansing

John Madigan, President – 517.342.2450
Matt Hufnagel, Vice President of Development – 517.342.2503

* If you plan to give units of a mutual fund, please allow two weeks for your gift transaction to be completed.

For information on the tax benefits of qualified charitable distributions from your IRA, see other side →



*“Go and Announce
The Gospel of the Lord.”*

Tax Benefits of Qualified Charitable Distributions from Your IRA

If you are 70 ½ years old, or older, and have deferred taxable income residing in an individual retirement annuity (IRA), you may be able to direct tax-advantaged transfers to The Catholic Foundation in payment of your gift commitment to the Diocesan Services Appeal (DSA). Simply instruct your IRA trustee or custodian to direct that a transfer check be made from the IRA directly to The Catholic Foundation for the benefit of DSA as described below.

If you make such a qualified charitable distribution (QCD), for the amount of your required minimum distribution, you will have satisfied your annual distribution requirement and you will not have to pay income tax on that amount. In fact, you can make QCDs of up to \$100,000 each year from your IRA. That’s a real tax advantage for a charitably minded IRA owner who doesn’t need the required distribution to live on, and doesn’t want to pay income taxes on required IRA distributions.

To give from your IRA, please have the distribution check made payable to:

The Catholic Foundation

**Mail the check to: The Catholic Foundation – DSA
228 N. Walnut Street
Lansing, MI 48933**

Ask your trustee or custodian to include your name, address, and parish name with your check when you submit your IRA distribution request.

Qualified charitable distributions can be made from any IRA, but not from a simplified employee pension, a simple retirement account, or an inherited IRA. Consult your tax advisor with any questions about this terrific opportunity.

**The Catholic Foundation Federal Tax ID: 81-2025056
The Catholic Foundation Contact:
Matt Hufnagel, Vice President of Development – 517.342.2503**

For information on how to fulfil your
DSA pledge through a gift of stock,
see other side →