

# ARCHDIOCESE OF GALVESTON-HOUSTON DEVELOPMENT DEPARTMENT CHANCERY ADVISORY

PLANNED GIVING- Information on different tax-advantaged ways to support the church.

## Charitable Gifts from an IRA

**Qualified Charitable Distributions (QCD) to parish offertory (without other combined gifts, like DSF) can be made directly to the parish, and do not need to go through the Archdiocese.**

**Provide the parishioner the Archdiocesan Tax id – 74-6018777  
and the Parish address**

Qualified Charitable Distributions, or QDCs are a way an Individual above age 70½ can make a gifts up to \$100,000 every year directly from their IRA to charitable organizations. This charitable gift option applies only to IRA and Roth IRA plans, not to other retirement plans such as 401(k), 403(b), pension, profit sharing, Keogh, and employer-sponsored SEP IRAs and simple IRA plans. Donors are encouraged to consult their retirement plan administrator, or their tax or financial advisor to determine whether this option would be advantageous for each donor's financial and tax circumstances.

The QCD - key provisions are:

- The QCD allows donors 70½ or older to transfer up to \$100,000 directly from their IRA to a qualified 501c3 charity on an annual basis
- An IRA rollover gift is a tax-free distribution for the donor. Qualifying individuals can make charitable gifts using pre-tax IRA assets rather than taking a distribution, paying income taxes on the distribution and then using after tax assets to make a charitable gift
- An IRA rollover gift can be used to meet all or part of an IRA's annual required minimum distribution or RMD.

## New IRA Gift Tool on Archdiocesan Website

To create a custom Letter of Intent to your IRA plan manager requesting a gift to your parish, the archdiocese or another Catholic organization, click here [IRA-Charitable Rollover](#).

## Learn More

A tax or legal advisor can provide you with additional information. We would be happy to assist you as well. Simply contact us at 713-652-4417 or [development@archgh.org](mailto:development@archgh.org).

## Make a Charitable Gift from your Donor Advised Fund

Invest in ministerial mission of our local Church with a gift from your donor-advised fund (DAF)!

A donor advised fund (DAF), is like a charitable savings account, gives you the flexibility to recommend how much and how often money is granted to Archdiocese of Galveston-Houston and other qualified charities. You can recommend a grant or recurring grants now to make an immediate impact or use your fund as a tool for future charitable gifts.

A few things to know:

- You can use your DAF to make a one-time or a recurring gift.
- You will receive an acknowledgment for your gift, but not a charitable receipt for tax purposes. This is because it is your contribution to your donor-advised fund that is tax-deductible, not your distribution to the Archdiocese, parish, school or other Catholic organization.
- You may not be able to receive benefits, in exchange for a gift made through your donor-advised fund. Please refer to your donor-advised fund or financial advisor.

**Make a gift today!**

If you would like to support your parish offertory, please direct your DAF distribution to the parish and mail to the parish address.

If you would like to support the archdiocese (DSF, Ignite, Retired Priests, etc.) or a combination of parish and archdiocese, please direct your DAF distribution to:

Archdiocese of Galveston-Houston  
ATTN: Development  
1700 San Jacinto St..  
Houston, TX 77001

Ask your DAF representative to include your name and address on the distribution, so we know how to direct your acknowledgment.

**The Archdiocese of Galveston-Houston and all parishes are registered 501 (c) (3) charitable organizations.**

Archdiocese of Galveston-Houston's: EIN / Federal Tax ID: 74-6018777

**Questions?**

If you have questions or would like additional information, please contact us at 713-652-4417 or email us at [development@archgh.org](mailto:development@archgh.org).

# SUPPORT THE GOOD WORK OF THE ARCHDIOCESE OF GALVESTON-HOUSTON DIRECTLY FROM YOUR IRA!



## WHAT ARE MY BENEFITS?

- Your generosity helps **strengthen** our local church.
- Avoid income tax on your **required minimum distributions (RMD)** by donating directly to the Archdiocese.
- You can exclude **up to \$100,000** of your donation from your **Adjusted Gross Income**.



THE ARCHDIOCESE OF  
GALVESTON-HOUSTON

An IRA qualified charitable distribution (QCD)  
is an opportunity to satisfy **ALL** or part of your  
required minimum distribution!

## HOW DO I DONATE?



1. You must be **70 1/2**  
or older to make a  
donation from an IRA to  
the Archdiocese of  
Galveston-Houston.

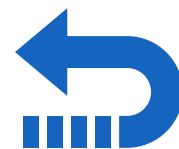


2. Choose **how much**  
to give!  
You can give up to  
\$100,000 from your  
Traditional or Roth  
IRA.



3. Inform your account  
manager you wish to  
make an IRA  
contribution and  
complete form on  
reverse.

**Send completed form  
to account manager.**



4. Return a **copy** of  
completed form on reverse  
to:

**plannedgift@archgh.org**

or

**Michelle Munoz**

**PO Box 907**

**Houston, TX 77001-0907 or**

**fax to: 713-659-7640**

*Failure to send a copy of the letter of intent  
form to the Development Department may  
delay the distribution of your donation.*

For assistance contact:  
Michael Schillaci, 713.652.4418  
or Michelle Munoz, 713.652.8242  
[plannedgift@archgh.org](mailto:plannedgift@archgh.org)

# LETTER OF INTENT

Please complete this form for IRA gifts.

For further assistance, please contact:

Michael Schillaci: 713.652.4418

Michelle Munoz: 713.652.8242

*plannedgift@archgh.org*

I plan to make a Qualified Charitable Distribution (QCD) from my IRA. (PLEASE PRINT)

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

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

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

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

Please accept my gift of \$ \_\_\_\_\_ to be credited to the  
**Archdiocese of Galveston-Houston** (Federal Tax ID #: 74-6018777) for the benefit of:

Parish: \_\_\_\_\_

Capital Campaign

Offertory/General Fund

Catholic School: \_\_\_\_\_

Diocesan Service Fund (DSF)  Ignite  St. Mary's Seminary

Fiorenza Retired Priest Residence Endowment

Other: \_\_\_\_\_

For the administrator of your IRA: Please make checks payable to:

Archdiocese of Galveston-Houston

PO Box 907 Houston, TX 77001-0907

Tax ID #: 74-6018777



THE ARCHDIOCESE OF  
GALVESTON-HOUSTON

DONATE STOCKS AND

# MAKE A BIG IMPACT

It's easy to support the Archdiocese of Galveston-Houston!



Instead of donating the after-tax proceeds from the sell of your appreciated securities, consider **increasing** your impact by donating **stock, bond, and mutual funds**, directly to the Archdiocese of Galveston-Houston.

To obtain a deduction for the current year the stock transfer must be received by **December 31st**.

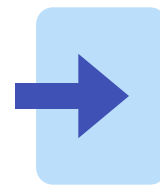
## DONATE STOCKS IN 3 STEPS



1. Please complete the letter of intent form on reverse.



2. Send the completed form to your broker, along with any forms they require.



3. Return a **copy** of completed form on reverse to:  
**plannedgift@archgh.org**  
or  
**Michelle Munoz**  
**PO Box 907**  
**Houston, TX 77001-0907** or  
**fax to: 713-659-7640**

Failure to send a copy of the letter of intent form to the Development Department may delay the distribution of your donation.

For assistance contact: **Michael Schillaci, 713.652.4418**  
or **Michelle Munoz, 713.652.8242**  
**plannedgift@archgh.org**



THE ARCHDIOCESE OF  
GALVESTON-HOUSTON

# LETTER OF INTENT

## ELECTRONIC TRANSFER OF STOCK

Please complete this form for donations of stock.

**For further assistance, please contact:**

Michael Schillaci: 713.652.4418

Michelle Munoz: 713.652.8242

[plannedgift@archgh.org](mailto:plannedgift@archgh.org)

It is my intention to transfer share of stock. (PLEASE PRINT)

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

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

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

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

**I will donate \_\_\_\_\_ (# of shares) of \_\_\_\_\_  
(company) stock to be credited to the Archdiocese of Galveston-Houston  
for the benefit of :**

Parish: \_\_\_\_\_

Other

Capital Campaign

Offertory

Catholic School: \_\_\_\_\_

Diocesan Service Fund (DSF)  Ignite  St. Mary's Seminary

Fiorenza Retired Priest Residence Endowment

Other: \_\_\_\_\_

Information to provide to your broker: Please direct the transfer of stock to the account of the Archdiocese of Galveston-Houston at Merrill Lynch: **Acct # 582-96B13 / DCT #8862**



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