

Instructions for Remittance of Gifts to the Idaho Catholic Appeal

All pledges and gifts to the **Idaho Catholic Appeal** will be processed by the Finance Office of the Roman Catholic Diocese of Boise. To assure prompt and proper tracking of all donations, the submission of all pledges, gifts and/or payments should be submitted to the Diocesan Pastoral Center (DPC) in a timely manner. All parishes are asked to follow this established protocol as described below:

- 1. Do not open envelopes.**
- 2. Loose cash/currency:** Please count and deposit loose cash/currency (i.e., bills and coins) collected for the Appeal. Please process a check from the parish to the *Diocese of Boise* for the amount of the deposited loose cash/currency on a weekly basis. If cash is already in an envelope, please do not open it. Instead, please send envelope to diocese with other gifts.
- 3. At a minimum every week,** please remit all ICA envelopes unopened to the diocese at:

Finance Department
1501 S. Federal Way, Suite 400
Boise, ID 83705

We appreciate your cooperation in following these steps to ensure the security and protection of contributions to the Roman Catholic Diocese of Boise for the Idaho Catholic Appeal.

If you have any questions or need additional information, please contact Jan Noriyuki, Development Officer, by phone at 208-350-7554 or by email at jnoriyuki@rcdb.org.

Diocesan Employee Payroll Deductions

Employees of the Diocese may have their Idaho Catholic Appeal pledge/gift payments deducted from their monthly paycheck. To make arrangements, please contact the Diocesan Payroll office at (208) 350-7513.

Gifts of Stock

Parishioners are encouraged to take advantage of tax laws by donating non-cash items such as appreciated stock and mutual funds. If the donor were to sell the stock outright, capital gains taxes would apply to the increased value of the stock. However, if the stock is donated, the current market value of the stock is received by the Diocese (or parish) and this amount is deductible as a charitable donation for the donor, while no capital gains taxes apply. This method for charitable giving is also useful if the donor has no record of the basis (cost) of the stock for tax purposes, and is hesitant to sell the stock because of tax implications. On the next page are instructions and a form for making an electronic transfer of stock. For questions, contact Cari Magette in the Finance Office at cmagette@rcdb.org or call 208-350-7511.



Security Delivery Instructions for Custodian

For Account Name: Roman Catholic Diocese of Boise - Donations

Account Number: #10152411

To deposit any DTC-eligible security into a U.S. Bank Trust account:

Including but not limited to Equities, Corporate and Municipal Bonds, Commercial Paper, Medium-Term Notes, Collateralized Mortgage Issues, and Zero Coupon Bonds

Instruct current custodian to deliver to: The Depository Trust Company
Participant Account 2803
For credit to Roman Catholic, Boise – Donations #10152411

To deposit any Fed-eligible security:

Including all Fed-eligible Bonds, Bills, Notes, and agencies, including GNMA's

Instruct current custodian to deliver to: Federal Reserve Bank of Cleveland
For: U.S. Bank, N.A., Trust
ABA 042-000-013
1050/TRUST
For Account Number: #10152411

To deposit physical certificates for any of the foregoing, or for some type of security not shown:

Instruct current custodian to deliver to: U.S. Bank
1555 N. RiverCenter Dr
Suite 302
Securities Processing, MK-WI-S302
Milwaukee, WI 53212

Cost Basis Transfer Statements should be sent to:

CBRS: Broker 02803

Manual Statements: U.S. Bank
1555 N. RiverCenter Dr
Suite 302
Securities Processing, MK-WI-S302
Milwaukee, WI 53212

Prior to delivery, please provide:

Shares: _____ **Security Name:** _____

Ticker/Cusip _____ **Cost basis:** _____

to Sara.Osmundson@usbank.com and Jennifer.Hogaboom@usbank.com.

Tele #: 1-503-464-3781 Fax #1-866-706-1612.

Donor's Name: _____

Donor's Address: _____

Donor's Instructions for Future Use: _____

Please send email to Cari Magette at cmagette@rcdb.org or call at 208-350-7511 indicating your name, address and phone number, a description of the type and number of shares donated, as well as the intended purpose of the donation. Upon completion of transfer, an acknowledgement letter will be sent to donor.