



Our Faith STO

a school tuition organization

1229 Mt. Loretta Ave • Dubuque, IA 52003
(563) 556-2580 x296 • www.ourfaithsto.org

OFFICE USE ONLY

Date Received: _____
DWID: _____
TCC #: _____
PT: _____

TAX CREDIT INFORMATION

By Law, tax credits may only be issued to one individual per donation.

Taxpayer Name: _____
Taxpayer SSN / EIN (required if 1st time donor): _____
If Business Donor, Please List Type (S-Corp, LLC, etc): _____
If Business Donor, Please List Tax Yr End Date (6/30, 12/31, etc): _____
If Memorial, List Details: _____
___ I wish my donation to remain anonymous.

GIFT INFORMATION

Gift Amount: \$ _____ Check Enclosed *Make check payable to: Our Faith STO*
___ Credit Card: ___ MasterCard ___ VISA ___ Discover ___ American Express
Credit Card Number: _____
Expiration: ___ CSV #: ___ Signature: _____
Electronic Funds Transfer (EFT): Bank/CU Name: _____
Chk/Sav Acct. Number: _____ Routing Number: _____
Make my gift a recurring monthly gift: ___ Ending date (if any): _____

___ I plan to give stock. *See reverse side for instructions on gifts of stock.*
___ I plan to give grain. *Before beginning the transfer process please contact Steve Kane at 563-556-2580 x296.*

TAXPAYER CONTACT INFORMATION

Address: _____
City: _____ State: _____ Zip: _____
Email: _____
Phone: _____

FINAL STEPS

Mail your contribution with this completed form to:

Our Faith STO: 1229 Mt. Loretta Ave, Dubuque, IA 52003

- Tax credits are awarded on a first come, first served basis.
- Contributions must be postmarked by **12/31** to be eligible for a tax credit for the same year.
- In the event the tax credit limit has been reached when this gift is received, your gift will be promptly returned.
- If you have set up a recurring gift, your consolidated receipt will be mailed at the end of the calendar year.

It is important to note that donor requested restrictions to specific school(s)/system(s) are subject to the following STO regulations. Up to 50% of gifts may be restricted to school(s)/system(s) as designated. The Contributor understands and agrees that if a school/system designated for a restricted contribution does not have one or more students who are eligible to receive tuition assistance under the law's requirements or all eligible students have received the maximum assistance set by the STO board so as to permit for the full use of the requested contribution, the contribution, or the unused portion thereof, will be used for tuition assistance for qualifying students at any of the STO schools/systems. There are no appeals.

GIFT DESIGNATION

___ I hereby direct **100%** of this contribution be deposited in the STO's unrestricted fund.

___ I hereby direct **50%** of this contribution to provide tuition assistance to students attending school(s)/system(s) listed below. (Please circle.)
Please note that unless you have marked the anonymous box, your name and the amount of your donation that was restricted will be shared with the administrator of the school(s) designated.

RESTRICTED CONTRIBUTION DESIGNATIONS

1	Ames, St. Cecilia	22	Holy Cross, LaSalle
2	Anamosa, St. Patrick	23	Independence, St. John
3	Bellevue, Marquette	24	Jesup, St. Athanasius
4	Calmar, Ossian, Spillville St. Teresa	25	Manchester, St. Mary
5	Cascade, Aquin	26	Maquoketa, Sacred Heart
6	Cedar Falls, St. Patrick		
12	Cedar Rapids and Marion: Xavier Catholic Schools	28	Marshalltown, St. Francis
13	Charles City, Immaculate Conception	29	Mason City, Newman
14	Cresco, Notre Dame	30	Monticello, Sacred Heart
15	Decorah, St. Benedict	31	New Hampton, St. Joseph
16	Dubuque, Holy Family	35	Protivin, Trinity Catholic
17	Dyersville, St. Francis Xavier	36	Waterloo, CVCS
18	Dyersville, Beckman	37	Waukon, St. Patrick
19	Farley-Peosta, Seton	38	Waverly, St. Paul's Lutheran
20	Gilbertville, Raymond Bosco	39	Webster City, St. Thomas Aquinas

IMPORTANT REMINDERS

- If sending your contribution after **December 1**, **please check the website to see if credits are available:** Credits are limited and awarded on a first come first served basis.
- **After December 1**, please contact our office before initiating your stock contribution to verify tax credit availability. *Stock gifts should be received by December 15.*
- Please consult your CPA or tax professional with questions about the tax impact of your gift.

If you have questions regarding your gift, please contact: Steve Kane, Director of Our Faith School Tuition Organization
(563) 556-2580 x296 or s.kane@dbqarch.org

Stock Contributions

A contribution of common stock to the STO program is a win-win situation. Please follow the steps below to ensure that your contribution of stock is received and applied correctly. **If initiating a stock transfer after December 1st, please verify with our office that tax credits are still available at (563) 556-2580 x296.** Failure to submit both the stock form below and the STO donor form may result in ineligibility for the Iowa Tax Credit.

• If the form below and the STO Donor Form are not received within 14 days of the stock transfer your gift may not be eligible for an Iowa Tax Credit. Please contact: Steve Kane at s.kane@dbqarch.org or (563) 556-2580 x296 with questions.

• If Stocks are held in "street name" in a brokerage account direct your broker/dealer to transfer the contributed stock to the following account:

• **LPL Financial**

DTC#0075, Account Number 55111044

FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa

• If your stock is held at one of the following brokers then you may transfer to one of the following accounts:

• **Wells Fargo Advisors**, Account Number 7006-9391 FBO:

Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa

• **Charles Schwab**

Account Number 7443-8622

FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa

• **Edward Jones**, Account Number 977-12680-1-9, FBO:

Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa

• **Fidelity Investments**, Account Number Z50-532436

FBO: Our Faith, Our Children, Our Future School Tuition Organization, Dubuque, Iowa

If stocks are held in certificate form, on the back, you assign the certificate to the Our Faith, Our Children, Our Future School Tuition Organization, sign and date at the bottom and deliver them to the Finance Office at:

**The Archdiocese of Dubuque Pastoral Center
1229 Mt. Loretta Ave, Dubuque, IA 52003**

NOTICE OF STOCK GIFT TO OUR FAITH, OUR CHILDREN, OUR FUTURE STO

Mail this page to: Our Faith STO 1229 Mt. Loretta Ave,
Dubuque, IA 52003

Or Fax this page to: (563) 556-5464

DONOR CONTACT INFORMATION

Donor Name: _____

Address: _____

Phone: _____

**Quantity & Stock
Donated:** _____

Donation Process:

Electronically: _____ Certificate(s) delivered to Finance Office: _____
(at the Pastoral Center)

**If electronically, donor's
broker/agent:** _____

**Broker/Agent's
telephone:** _____

Date of gift: _____

**If you have questions regarding your gift, please contact: Steve Kane, Director of Our Faith School Tuition Organization
(563) 556-2580 x296 or s.kane@dbqarch.org**