



**MOTHER
McAULEY**
Liberal Arts High School

3737 W. 99th Street
Chicago, IL 60655
773.881.6500
www.mothermcauley.org

We appreciate your interest in a gift to Mother McAuley through a stock transfer. Transferring appreciated securities is an excellent way to support Mother McAuley and receive double tax benefits, including:

- Charitable income tax deduction based on full market value of the securities
- Avoidance of the capital gain tax due upon sale of the stock

To begin the process, inform your broker in writing that you wish to give appreciated securities to Mother McAuley High School. Let us know that you have initiated a transfer to Mother McAuley by contacting Terry Corcoran in our Finance Department at tcorcoran@mothermcauley.org or 773-881-6507 and providing the requested information below.

Name of Broker: _____ Date: _____
Address of Broker: _____ Phone: _____

The following securities will be transferred to Mother McAuley Liberal Arts High School.

FROM:

Donor's Account Number: _____

Registration on Account: _____

Name of Security: _____ Number of Shares: _____

Name of Security: _____ Number of Shares: _____

TO:

Fifth Third Bank Account Name/ Mother McAuley High School, Institutional ID#: 11153

DTC Eligible Securities: Participant #2116, Agent Bank #10016, ABA# 230028890204

Federal Reserve Eligible Securities: ABA#042000314/Fifth Cin/1050, FFC A/C#230028890204

Contact: Sara Booms, 312-704-4146, Fifth Third Institutional Services, Sara.Booms@53.com.

- It is imperative that these shares be transferred, not sold, out of your account in order to complete a charitable gift to Mother McAuley.
- The value of your gift will be calculated by using the mean value of each share on the date the shares arrive in our brokerage or mutual fund account. A proper tax receipt will be based on this amount.
- If you are concerned about the timing of your gift, please be sure to work closely with your broker or mutual fund company to ensure that the shares are transferred in a timely manner.



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Delivery Instructions

Note: All applicable information must be completed prior to sending delivery instructions or TOA form.

Federal Reserve Wire Instructions (Cash)

Fifth Third Bank, Cincinnati, Ohio	
ABA (Affiliate ABA #)	042000314
	71575856
Fifth Third DDA A/C #: (Affiliate wire #)	
	MOTHER MCAULEY HIGH
F/F/C (Client Account Name/#)	SCHOOL
	230028890204

Mutual Funds:

The following mutual fund account(s) are established at the individual fund companies. Delivery into the specific fund account # below is necessary to complete the transfer of assets.

Note: Fifth Third Bank is not ACAT eligible and does not have the ability to pull shares from the fund. Please do not transfer shares into client's individual name.

Contact information with regards to established networked fund account numbers.

Fifth Third Bank Investment Operations
Mutual Funds Transfers Dept
Email: Ops.InvestmentOperations.Cincinnati@53.com

Fifth Third Institutional Services
Sara Booms 312-704-4146
Sara.Booms@53.com

Mother McAuley High School
Terry Corcoran, CFO and Vice President of Finance
773-881-6507
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