



Our Faith, Our Children, Our Future

School Tuition Organization

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

OFFICE USE ONLY	1-21
Date Received:	_____
DWID:	_____
TCC #:	_____
MKTC:	STOWEB
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 Jeff Schneider at 563-556-2580 x219.*
 I plan to give a Qualified Charitable Distribution (QCD) from my IRA.

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 **12/31/21** to be eligible for a 2021 tax credit.
- 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	19	Farley-Peosta, Seton
2	Anamosa, St. Patrick	20	Gilbertville, Raymond Bosco
3	Bellevue, Marquette	21	Guttenberg, St. Mary
4	Calmar, Ossian, Spillville St. Teresa	22	Holy Cross, LaSalle
5	Cascade, Aquin	23	Independence, St. John
6	Cedar Falls, St. Patrick	24	Jesup, St. Athanasius
7	CR, All Saints	25	Manchester, St. Mary
8	CR, Holy Family	26	Maquoketa, Sacred Heart
9	CR, St. Matthew	27	Marion, St. Joseph
10	CR, St. Pius X	28	Marshalltown, St. Francis
11	CR, Regis MS	29	Mason City, Newman
12	CR, Xavier HS	30	Monticello, Sacred Heart
13	Charles City, Immaculate Conception	31	New Hampton, St. Joseph
14	Cresco, Notre Dame	35	Protivin, Trinity Catholic
15	Decorah, St. Benedict	36	Waterloo, CVCS
16	Dubuque, Holy Family	37	Waukon, St Patrick
17	Dyersville, St. Francis Xavier	38	Waverly, St. Paul's Lutheran
18	Dyersville, Beckman	39	Webster City, St. Thomas Aquinas

IMPORTANT REMINDERS

- If sending your contribution after November 1, 2021 **please check the website or call to see if credits are available.** Credits are limited and awarded on a first come, first served basis.
- IRA and stock contributions **must be made on or before December 15, 2021** (assuming credits avail.).
- To qualify as a Qualified Charitable Distribution (QCD) that satisfies your RMD requirement, you must be 72 (or 70 1/2 if born before 7/1/49) at the time the gift is made. The donor must also be classified as retired.

If you have questions regarding your gift, please contact **Jeff Schneider, Director of Stewardship Development** at (563) 556-2580 x219 or jeff.schneider@dbqarch.org

Stock Contributions

A contribution of common stock to the STO program is a win-win situation. Please follow the steps below to insure that your contribution of stock is received and applied correctly. **If initiating a stock transfer after November 1st, please verify with our office that tax credits are still available at (563) 556-2580 ext. 219.** 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 Jeff Schneider at jeff.schneider@dbqarch.org or (563) 556-2580 ext. 219 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, Our Children, Our Future 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 Jeff Schneider, Director of Stewardship Development for the Archdiocese of Dubuque at (563) 556-2580 x219 or jeff.schneider@dbqarch.org