



Direct Gifts From Retirement Accounts

Background:

Parishioners may experience a tax benefit from making their contribution to the Parish from their appreciated retirement assets. In this case (whether its a Required Minimum Distribution or other gift from an IRA or retirement assets) it is desirable to make an arm's length direct contribution from the retirement account to the parish without the donor receiving the distribution.

The Parishioner's broker must initiate the transfer of assets, which is typically by check, but often the check itself lacks important information. Therefore we need to be told to watch for the gift. None the less it is a fairly straightforward **two-step process**:

Step I

Provide the following information about St. Mary Parish to your broker:

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|-------------------------|-----------------------------|
| Beneficiary Name: | St. Mary Congregation, Inc. |
| Organization Status: | 501(c)(3). |
| Tax ID Number: | 39-0911065 |
| State of Incorporation: | Wisconsin |
| Date of Incorporation: | 12/9/1897 |

Mailing Address:
St. Mary Congregation, Inc.
Attention: Finance Office
9520 W. Forest Home Avenue
Hales Corners, WI 53130

Step II

Advise the Parish Finance Office of the details of your gift:

The Parish needs to know that your gift is coming, how you wish us to use the gift and any special donor information so we can credit your gift and express our gratitude appropriately. It is common for the sending broker to exclude the name(s) of the donor from the check and it's rare that the check includes directions on how you want your donation to be used. So, we need your help to properly match up the donor intent with the gift. We always appreciate your letting the Parish Accountant know the gift is coming.

Parish Contact:

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| Parish Accountant: | Mayra Moreno Garcia |
| Email: | MorenogarciaM@stmaryhc.org |
| Phone: | 414-425-2174 x 221 |