



## REBUILDING A HOUSE FOR THE CHURCH THE CAMPAIGN FOR AN EXPANDED WORSHIP SPACE *SAINT MARGARET MARY CHURCH ~ 2010*

**Dear Brothers and Sisters in Christ,**

### **Campaign Confidentiality**

From the very outset of this campaign, I want to make it perfectly clear that ALL contributions received and all conversations with donors are considered confidential information. All campaign workers are instructed that this is an extremely important matter, not only for the campaign, but for our life together as a parish family.

When the campaign committee meets regularly, the only information shared with the group is a summary of the number of visits made and the total amount of pledges received. This will help all to keep abreast of the progress being made toward the final goal. These totals then will be communicated each week to parishioners in Heart to Heart and on the website [www.smmlb.org](http://www.smmlb.org).

### **Making a Gift of Securities**

Gifts of appreciated stock is an excellent way to fund a donation to *Rebuilding a House for the Church*. If you have held the stock for at least one year with a low cost basis, you can take a charitable deduction for the full value of the stock on the date of transfer to the Campaign and utilize the deduction to offset other taxable events. To make a gift of securities:

- ❖ Instruct your financial services firm to send the securities to the Diocese of Greensburg account at Janney Montgomery Scott through Depository Trust as follows:

DTC # 0374: Janney Montgomery Scott  
For credit to Saint Margaret Mary Church  
Rebuilding a House for the Church  
Account Number: 2634 -0576

- ❖ Call The Catholic Foundation for the Diocese of Greensburg, at 724-552-2505 to alert us to the gift. Janney Montgomery Scott will know the name of the financial services firm transferring the securities but not the name of the donor who initiated the gift.

### **Making a Gift From Your IRA**

The Pension Protection Act of 2006 allows direct transfers\* to charities from IRAs in 2009 if:

- ❖ The donor is at least 70½ years of age;
- ❖ A check is sent directly to **Saint Margaret Mary – *Rebuilding a House for the Church*** from an IRA account;
- ❖ Transfers do not exceed \$100,000 per year;
- ❖ Gifts are outright (charitable trusts and gift annuities do not qualify).

Donors who meet these requirements may save estate taxes—and their non-spousal heirs income taxes—while benefiting *Rebuilding a House for the Church*.

*\*The amount of the gift is excluded from gross income, and no income tax charitable deduction is allowed.*

*In all cases, donors should consult their tax advisors concerning the treatment of these gift techniques as they may vary depending upon individual circumstances.*

*Monsignor Gaston*