

## Planned Gifts – Giving Retirement Assets, Bequests, Trusts, Etc.

There are several types of gifts that may fall under this category, many of which are very simple to make:

- **Life Insurance:** you can simply name Saint Brendan Church as a beneficiary;
- **Retirement Assets:** you can name Saint Brendan Church as a beneficiary of your IRA, 401(k) or other qualified retirement plan. Any amounts remaining in your plan, free of income and estate tax, will transfer to Saint Brendan Church.
- **Bequests:** you can name Saint Brendan Church in your will as a beneficiary, and your estate will receive an income tax deduction for the value of your bequest. A bequest written in a will can be made for either a percentage or an amount.

### Other Non-Cash Gifts

#### A. Transfers from a Donor Account at a Brokerage House

We will need a letter of authorization from you similar to the sample letter below. If you have any questions call Mike Taylor at the number indicated below. Fax a copy to Mike Taylor at 415-364-4509 and Katherine Brooks at 415-614-5522.

Please give the following information to your broker for transferring securities to the Archdiocesan broker.

NOTE: All non-cash gifts transferred to the Archdiocese of San Francisco that are intended for Saint Brendan Parish will be transferred to us.

1. First Republic Securities Co., LLC  
Attn: Mike Taylor  
111 Pine Street  
San Francisco, CA 94111  
Email: [mtaylor@firstrepublic.com](mailto:mtaylor@firstrepublic.com)  
Phone: 415-364-4870  
Fax: 415-364-4509
2. First Republic Securities Co., LLC **DTC #0443**
3. S.F.Archdiocesan Account number is: **33L-070589**
4. Account Name: **Archdiocese of San Francisco**
5. Instruct your broker to include the following information on the trailer line (second line) of their transfer instructions: **FBO (provide Parish Name) and (Donor Name)**

#### B. Stock Certificates Donated Directly by Donor

Deliver the stock certificate and an executed stock power to the Parish Office or deliver a stock certificate and executed stock power form (via registered mail) to First Republic Securities at the above address. A letter of authorization must accompany the stock certificate and executed stock power.

*(See Sample Letter on following page)*

## Sample Letter

Date: \_\_\_\_\_

Mike Taylor  
First Republic Securities Co., LLC  
111 Pine Street  
San Francisco, CA 94111

Re:

Dear Mr. Taylor:

Please accept this as your authorization to deposit \_\_\_\_\_ shares of  
\_\_\_\_\_ stock into account no. 33L-070589, for the Archdiocese of San  
Francisco.

This donation is for the benefit of \_\_\_\_\_ Parish/School.

Sincerely,

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Joint Customer Signature

Phone Number: \_\_\_\_\_