



## **Giving Publicly Traded Stock to St. John Vianney High School**

Using publicly traded stock to make a gift to St. John Vianney High School can be a very tax-wise method of giving, especially if the stock has appreciated in value since you acquired it. Giving appreciated stock saves you tax dollars in two ways:

- First, you will receive an income tax deduction for the current value of the stock.
- Second, you avoid paying the tax on the capital gain of the stock.

### **How do I give publicly traded stock?**

If the stock is currently held in a brokerage account, simply request that your broker transfer the stock into the brokerage account of St. John Vianney High School. Your broker will require that you sign a document authorizing the transfer. Vianney's brokerage account information is:

Mr. Dan Basler  
Raymond James & Associates  
Phone: (314) 845-1900  
4163 Crescent Dr.  
St. Louis, MO 63129

Account Number: 81882172  
DTC Number: 0725  
FBO: St. John Vianney High School

St. John Vianney High School's Federal Tax ID Number: 43-0763332

**Important Note:** To ensure that St. John Vianney High School and Raymond James & Associates are properly notified of the gifted securities, please remind your broker to provide clear delivery instructions to Raymond James & Associates by providing YOUR NAME as the donor.

### **Please notify Vianney that you have made this transfer:**

Contact Jennie Picha at (314) 965-4853 Ext. 144, e-mail at [jpicha@vianney.com](mailto:jpicha@vianney.com) or mail to:

St. John Vianney High School  
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