

## ***Education Improvement State Tax Credit Program to benefit All Saints Catholic School***

### **Pre-authorization Steps Using a Gift of Stock**

*Thank you for your gift to this program. It provides tuition for more than a third of All Saints students. Your gift helps provide a quality Catholic education to families who otherwise would not be able to afford it. We appreciate you taking the time to complete this process.*

As you know, the State Tax Credit program requires preauthorization before a gift can be made. The steps are below:

1. At your convenience, please complete the enclosed two forms (Letter of Intent and preauthorization form) and return them to All Saints Catholic School, Attn: Alyssa McBride, 3418 Noble Ave., Richmond, VA 23222. Please make a note on the letter of intent that the gift will be of stock. Also, consider making the pledge for the most you think the stock may be worth so as not to come up short on tax credits -- the excess can always expire. (Do not transfer the stock yet.)
2. Within about 30 days, you will receive a pre-authorization certificate from the Department of Education in the mail.
3. You may transfer the stock anytime after the date on the pre-authorization certificate. The transfer is made to a Diocese account. Please see the stock transfer form attached for your use with your broker.
4. At this time, please sign the preauthorization certificate and send it to "McMahon Parater Foundation" to: Catholic Diocese of Richmond, 7800 Carousel Lane, Richmond VA 23294 Attn: Joyce Schrieber.
5. Please call or e-mail me ([amcbride@allsaintsric.org](mailto:amcbride@allsaintsric.org) or at [804 329-7524 x 108](tel:8043297524)) when you send the certificate and transfer the stock so I may follow-up on it.
6. Within about 30 days, you will receive an acknowledgement letter from the Diocese and a tax credit certificate from the Department of Education that you will then file with your 2017 return.

Please do not hesitate to contact Alyssa McBride if you have any questions. Thank you!

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