

# TRANSFER INSTRUCTIONS

## DTC Eligible Securities

Fidelity's DTC Clearing A/C #0226  
Fidelity's Agent Bank ID #62959  
Banker's Trust Institution ID #62959  
A/C: Bankers Trust #656251766  
FBO: Catholic Tuition Organization A/C:  
#0191311026

Please notify [jwells@dmdiocese.org](mailto:jwells@dmdiocese.org) of the #shares/stock name you are transferring.

## Mutual Funds

Charles Schwab & Co  
DTC: 0164 Code 40  
FBO: Catholic Tuition Organization  
CTO Schwab Account: #1211-7474

Please notify [jwells@dmdiocese.org](mailto:jwells@dmdiocese.org) of the #shares/name of security you are transferring.

## Schwab to CTO Schwab Acct

Client contacts their Financial Advisor or Schwab Alliance, authorizes journal request from their investment account to:  
CTO's Schwab account #1211-7474

Please notify [jwells@dmdiocese.org](mailto:jwells@dmdiocese.org) of the anticipated date and amount of your transfer.

## Qualified Retirement Distributions

When a donor is 70½ and is taking their required minimum distribution, they are eligible to receive the 65% Iowa tax credit but cannot deduct the contribution on their federal return as a charitable gift.

Please notify [jwells@dmdiocese.org](mailto:jwells@dmdiocese.org) of the amount and the name of the entity from which it will be sent.

## Grain Donations

Landus Cooperative  
A/C 48018

Please notify [jwells@dmdiocese.org](mailto:jwells@dmdiocese.org) of the cooperative/elevator you are using and the # bushels/grain to be donated.

# OUR GOAL

The goal of the CTO is to maximize financial assistance to all qualified students based upon available donations. To achieve this goal, parameters are established each year for tuition assistance in an effort to meet as much of the total demonstrated need as possible. Donations are distributed, as a percentage of tuition, based on the level of the financial need of qualified families.

All families who qualify are eligible to receive tuition assistance.

# OUR SCHOOLS

Christ The King, Des Moines	St. Francis of Assisi, WDM
Dowling Catholic, WDM	St. Joseph, Des Moines
Holy Family, Des Moines	St. Luke the Evangelist, Ankeny
Holy Trinity, Des Moines	St. Malachy, Creston
Sacred Heart, WDM	St. Patrick, Perry
St. Albert, Council Bluffs	St. Pius X, Urbandale
St. Anthony, Des Moines	St. Theresa, Des Moines
St. Augustin, Des Moines	Shelby County Catholic, Harlan

# MORE INFORMATION

CALL TODAY! (515) 237-5010

JEANNE WELLS, EXECUTIVE DIRECTOR  
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601 GRAND AVENUE DES MOINES, IA 50309  
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CTO  
CATHOLIC TUITION  
ORGANIZATION

# CONTRIBUTE TO INVEST IN THEIR FUTURE



DONATE ONLINE:  
[WWW.CTOIOWA.ORG](http://WWW.CTOIOWA.ORG)

# 2019 DONATION FORM



**CTO**  
CATHOLIC TUITION  
ORGANIZATION

**YES!** I want to support  
QUALITY CATHOLIC EDUCATION

Contributions to the **CTO** must be paid within 90 days of this pledge to be eligible for the tax credit. Total credits available are limited and will be provided to donors on a first-come basis.

**DONOR CONTACT INFORMATION**

TAXPAYER NAME(S) (PLEASE CIRCLE ONE) Individual, C-Corp, S-Corp, LLC, Partnership, Estate, Trust

SSN or Tax ID number (Required to issue tax credit; call if you prefer)

Daytime Phone

Email

Address

City

State

Zip

**GIFT INFORMATION**

Contribution to CTO \$ \_\_\_\_\_

- Enclosed
  - Pledged (due within 90 days of pledge)
- You will receive a 65% tax credit certificate from the CTO in January 2020 for your Iowa income tax return.

10% Additional Charitable Contribution \$ \_\_\_\_\_

With more families qualifying for tuition assistance, our goal is to raise an additional \$300,000 for kids to attend Catholic school. This portion of your contribution would **not** be eligible for Iowa tax credits but would qualify for a federal and state charitable contribution.

Total Contribution for 2019 \$ \_\_\_\_\_

Check here if you wish to remain anonymous

**CONTRIBUTION FULFILLMENT**

I want to make my contribution using my credit card:

- Master Card
- Visa
- American Express
- Discover

Name on Credit Card \_\_\_\_\_

Credit Card Number \_\_\_\_\_

Exp. \_\_\_\_ / \_\_\_\_ (month / year)      CSC: \_\_\_\_\_ (code on back of card)

X \_\_\_\_\_  
Signature (For credit card transaction)

**STOCK, GRAIN, OR QUALIFIED  
RETIREMENT DISTRIBUTIONS**

See back for Transfer Instructions

The bottom line? *It's for the KIDS...*  
**and their futures!**

WWW.CTOIOWA.ORG • (515) 237-5010  
JEANNE WELLS, EXECUTIVE DIRECTOR  
JWELLS@DMDIOCESE.ORG

**For Internal Use**

ConsID \_\_\_\_\_ Ck Date \_\_\_\_\_  
 Last Name \_\_\_\_\_ Appeal 2019CTO  
 Amt \_\_\_\_\_ Rcpt 2019030 \_ \_ \_  
 Ck # \_\_\_\_\_ Rcpt Amt \_\_\_\_\_