



St. Peter's Parish Endowment

Ensuring Our Future

Making a Gift of Stock

A gift of appreciated stock is a wonderful way to support the St. Peter's Parish Endowment Fund. Our endowment fund is part of the Catholic Community Foundation, which works directly with Country Club Trust Company to handle deposits and transfers of all kinds.

Instructions for Stock Transfer

We ask you to take a couple of steps to help your transfer go through smoothly.

1. Please let us know that you are preparing to make a gift of stock. A phone call or email to our development director, Karen Conley, is fine. She may be reached at , 816-800-0105; or kconley@stpeterskc.org.
2. Please let us know when you plan to execute the transfer. Approximate timing is fine.
3. Please let us know the name of the stock to be transferred, as well as the number of shares or approximate value of the shares.

We will convey this information to our representatives at Country Club Trust Company so that they may be watching for the transfer, and will have the information they need to process your gift quickly.

4. Please advise your broker to use the following information in the transfer:
DEPOSITORY TRUST COMPANY (DTC) – ELIGIBLE
BMO Harris Bank N.A./ Trust
Participant Number #992
F/B/O Country Club Bank 74-2016-01-7
F/C: 85-61-7460-01-9 (St. Peter's Parish Endowment Fund)
5. If your gift involves a physical stock certificate, please contact Karen Conley to arrange a time to bring it to the parish office. We can then make sure we have all the necessary donor information to process your gift.

Thank you for considering a gift of stock to St. Peter's Parish Endowment Fund.
Your tax-deductible gift will support St. Peter's parish and school for generations to come.