



# YEAR-END GIVING

**SUPPORT OUR DIOCESE AND  
THE CATHOLIC CAUSES YOU  
CARE ABOUT MOST**

The Orange Catholic Foundation provides many options to support the Catholic causes you care about most. As you review your year-end tax planning, please consider a year-end gift to support the Orange Catholic Foundation and the Diocese of Orange.

Your charitable gift may be given to the Orange Catholic Foundation towards our capital campaign, our Pastoral Services Appeal (PSA), or to support a parish or school endowment.

Our website provides a list of our programs in support of Catholic education and the ministries of our Pastoral Services Appeal as well as our endowment and other funds. We also provide a detailed explanation of how to give, including Brokerage Charitable Gift Accounts, Electronic Funds Transfer, Matching Gifts, Pledges, Gifts of Property, Planned Gifts, and Gifts of Securities.

*You are being enriched in every way for all generosity,  
which through us produces thanksgiving to God.*

2 Corinthians 9:11

\*This information is intended to be general in nature. Please discuss your year-end tax planning with your accountant or other professional advisor. The Orange Catholic Foundation would be pleased to provide you with further information at your request by calling 714.282.3021 or emailing [info@OrangeCatholicFoundation.org](mailto:info@OrangeCatholicFoundation.org). All donations are fully tax-deductible as allowed by law.

## WHERE AND HOW CAN I GIVE?

- Credit Card: Give online with a credit card at [www.OrangeCatholicFoundation.org](http://www.OrangeCatholicFoundation.org) or call the Foundation at 714.282.3021.
- Cash or Check: Mail or deliver your check to the Orange Catholic Foundation office. (Must be postmarked or received on or before December 31 of the current year.)
- Set up a recurring gift to benefit your parish, school and/or our campaign through electronic funds transfer (EFT) at [www.OrangeCatholicFoundation.org](http://www.OrangeCatholicFoundation.org).
- Planned Gifts of Charitable Gift Annuities and Charitable Trusts: Call the Foundation for more information.

## WHAT SHOULD I GIVE?

- Cash, check or credit card
- Securities: Gifts of appreciated securities, including mutual fund shares
- Life Insurance policies
- Retirement Funds
- Charitable Gift Accounts from investment firms

**Reminder: Gifts must be postmarked or received on or before December 31 of the current year, in order to qualify for a charitable deduction on your income tax return.**



13280 Chapman Avenue Garden Grove, CA 92840

714.282.3021 • 714.282.3136 (fax)

[www.OrangeCatholicFoundation.org](http://www.OrangeCatholicFoundation.org)

## THE ORANGE CATHOLIC FOUNDATION

# YEAR-END GIVING GUIDE

13280 Chapman Ave., Garden Grove, CA 92840

The chart below provides important information to help you plan for your charitable contributions and grants this year and in the future. Please allow additional time for the Orange Catholic Foundation to accept and process more complex gifts before the end of December. For general questions, please call 714.282.3021.

CONTRIBUTION TYPE	PROCESS	TIPS	ESTIMATED TIME	DEADLINE FOR DONORS
Checks	Send a check made payable to the Orange Catholic Foundation, indicating the name of your fund on the memo line. Mail checks: <b>The Orange Catholic Foundation 13280 Chapman Ave, Garden Grove, CA 92840.</b>	Check contributions do not require additional paperwork. To confirm the date your check arrives, you may want to consider requesting a confirmation receipt with your mail.	The Orange Catholic Foundation processes your check based on the day it arrives, but please allow 1 - 2 weeks for processing during the busiest times.	Postmarked by Dec. 31, of the current year.
Credit Card Contributions	Contribute online with the "donate now" button on our website, OrangeCatholicFoundation.org		Immediate	Received at the Orange Catholic Foundation by Dec. 31, of the current year.
Public Securities, Held Electronically (Stocks and Mutual Funds)	Send donation form to your broker with the Orange Catholic Foundation account number. This form is available online on our website, OrangeCatholicFoundation.org.	Please make sure to notify the Orange Catholic Foundation of your transfer in writing.	Timing depends on the broker processing the transfer. The value is the average of high and low price on the day transferred.	Received at the Orange Catholic Foundation by Dec. 31, of the current year. Allow 8-10 business days for processing year-end gifts.
Public Security Certificates	Gather the following: 1) A gifting letter, 2) an irrevocable stock power, and 3) the stock certificate, then call 714.282.3021 for instructions.	All 3 documents must be received to process the gift. Call us for the account number and instructions at 714.282.3021.	Varies, please contact the Orange Catholic Foundation for more information. Allow 8-10 business days for processing year-end gifts.	Received at the Orange Catholic Foundation prior to Dec. 31, of the current year with all documentation.
Retirement Assets (IRA)*	Contact your IRA representative to transfer your IRA distribution directly to the Orange Catholic Foundation. This is for donors 70 ½ years or older on the date of transfer.	For other retirement assets contact your fund administrator for specific advice on gifting strategies.	Please allow 3-4 weeks for your transfer.	Received at the Orange Catholic Foundation by Dec. 31, of the current year.
Charitable Gift Fund (Vanguard, Fidelity, Schwab, Community Foundation)	Please contact your Charitable Gift Fund administrator or visit their website to request a distribution (grant) to the Orange Catholic Foundation.	Act today to ensure your grant is received by the Orange Catholic Foundation in a timely way.	Some charitable gift fund managers have a deadline of Friday, December 9 to process a distribution by the end of the calendar year.	Please recommend your grant transfer to the Orange Catholic Foundation by the beginning of December to ensure your grant is processed by year-end.
Wire Transfers	Please call 714.282.3021. We will then send you the corresponding instructions.	Please make sure to alert the Orange Catholic Foundation of your wire transfer so we can credit the appropriate fund in a timely manner.	Timing depends on the financial institution processing the transfer. Typically, 3 business days.	Received at the Orange Catholic Foundation by Dec. 31, of the current year.
Restricted Stock*	Please contact Executive Director Cindy Bobruk at 714.282.3021 for options.		Timing varies depending on the restrictions.	Please contact the Orange Catholic Foundation as soon as possible.
Closely-held Stock*	Please contact Executive Director Cindy Bobruk at 714.282.3021 for options.	Per the IRS, closely held stock will need a qualified appraisal within 60 days of the gift.	Timing varies, but typically we can review closely-held stock gifts within 1-2 months.	Please contact the Orange Catholic Foundation as soon as possible.
Real Estate*	Please contact Executive Director Cindy Bobruk at 714.282.3021 to discuss the options and documents needed to review.	Per the IRS, gifts of real estate need a qualified appraisal within 60 days of the gift.	Timing varies, but typically we can review and process real estate gifts in 2-3 months.	Please contact the Orange Catholic Foundation as soon as possible.

The Orange Catholic Foundation is happy to help you with the transfer of complex assets. In fact, it is our specialty. If you are considering a complex asset gift before the end of the year, please call us as soon as possible so that we can help you identify the documentation you will need. We accept complex assets throughout the year. Please call 714.282.3021 for more information. Tax ID #33-0934571.

\*\* Subject to review and approval by the Orange Catholic Foundation Board of Directors.

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