



WASHINGTON
NATIONAL CATHEDRAL

Giving Securities to Washington National Cathedral

Washington National Cathedral (WNC) is a legal entity of the Protestant Episcopal Cathedral Foundation (PECF). Gifts of securities to Washington National Cathedral are credited to their accounts via PECF. The WNC Development Office facilitates the information process with PECF, upon notification from the donor.

Broker-Assisted Electronic Transfers: The easiest, fastest, and safest way to gift appreciated securities held in “street name” for you by a broker or bank is by electronic transfer.

This requires a letter from the donor/s to the broker or bank that:

1. Identifies the shares (either a specific number or a target dollar total) to be transferred to the “Protestant Episcopal Cathedral Foundation for the benefit of Washington National Cathedral.”
2. Explains how the Cathedral should allocate the gift, i.e. Cathedral Fund (which supports the operating budget in the year received), or other program support, such as music, worship, preservation, Dean’s Forum, etc. (either unrestricted or how restricted).
3. Provides all information below on the PECF’s brokerage account.

Sign the letter with your legal signature/s, and communicate your intention to Washington National Cathedral’s Development Office by mailing or faxing copies of the letter, or by telephone or email to Marilyn Kochan. [This is crucial because wire transfers arrive without information identifying the donor/s, the PECF beneficiary institution, or the objective/s to be funded.]

WNC Development Office

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PECF & Broker Contacts

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Contact one of these individuals who will provide further account information for your transaction.

Special time-limited way for donors 70½ or older to give: Tax-free IRA Charitable Rollover. Donors can make charitable gifts directly (roll them over) from a traditional or Roth Individual Retirement Account—IRA—without incurring federal income taxes, *as long as:*

- Donor is 70½ years of age or older.
- Donor is donating less than \$100,000.
- Donor is making a direct gift (not a planned gift).
- Transaction is completed by December 31, 2013.