



Ways to Give

No matter how you choose to give to the Society of St. Vincent de Paul, your gift will preserve our mission and provide Vincentians across the United States with financial support, training, education, and spiritual formation as they assist millions of our most vulnerable neighbors.

There are many ways to give to SVdP USA that can maximize your tax savings and further your impact.

Gifts of Stock

Charitable tax advantages often make giving stock more beneficial than giving cash.

By gifting appreciated stock from your investment account, you may be eligible to:

- Receive a charitable income tax deduction
- Avoid capital gains taxes

To transfer shares of public stock to SVdP USA, provide your broker with the following information and notify us at dkempf@svdpusa.org of the amount and type of shares given so we can record and acknowledge your donation.

Bank Name: Fidelity
C/O Focus Partners
DTC Number: 0226
ACCT Name: National Council of
the United States, Society of St. Vincent de Paul, Inc.
ACCT Number: 628-178643

Estate Gifts

If SVdP USA has impacted your life, we invite you to consider making us part of your enduring legacy by including us in your estate plans. You can do this by:

- **Designating SVdP USA as a beneficiary** of a retirement plan, life insurance policy, or other financial account, or
- **Including SVdP USA in your will or trust** by inserting a provision containing our legal name and federal tax ID:

Legal Name: National Council of the United States, Society of St. Vincent de Paul, Inc.

Address: 66 Progress Parkway, Maryland Heights, MO 63043-3706

Federal Tax ID Number: 13-5562362

Gifts from Retirement Accounts

Making gifts to SVdP USA from your traditional retirement accounts allows you to:

- Avoid paying income tax on distributions
- Preserve your account's value

There are several advantageous ways to give from retirement accounts:

Required Minimum Distributions (RMD): If you are over age 72 and are required to distribute funds from your retirement plan, you can satisfy your annual RMD and avoid paying income tax on the distribution by giving directly to SVdP USA.

Qualified Charitable Distribution (QCD): If you are over age 70 ½, you can distribute up to \$111,000 per year from your IRA directly to SVdP USA without paying income tax. This counts toward your RMD.

Legacy IRA Transfer: Thanks to the SECURE 2.0 Act, if you are over age 70 ½, you can make a one-time tax-free donation of up to \$55,000 from an IRA directly to a charitable gift annuity or remainder trust that benefits SVdP USA.

Beneficiary Designation: At any age, you can designate SVdP USA as a beneficiary of your retirement accounts. Traditional retirement accounts make for great assets to transfer to tax-exempt charities because heirs are required to pay income taxes on their distributions.

Charitable Gift Annuities

We partner with the National Gift Annuity Foundation to provide charitable gift annuities (CGAs) to Vincentians interested in:

- Securing an immediate income tax deduction
- Reducing capital gains taxes owed on gifts of appreciated assets
- A life-long income stream for for you, you and your spouse, or up to two qualified individuals
- A future and lasting philanthropic impact at SVdP National Foundation for generations to come

A CGA is an agreement with SVdP National Foundation that provides significant immediate tax benefits and fixed income payments for life, no matter how long you live, in exchange for a charitable gift.

Other Assets and Giving Strategies

SVdP USA can accept a wide variety of assets such as cryptocurrency, real estate, art, or private business interests.

We can help you execute charitable giving strategies that maximize your impact and tax savings and make the most sense for you and your loved ones.

If you would like more information or assistance making these or other types of gifts, please contact us.

Dennis Kempf
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