



· DIOCESE OF FALL RIVER ·  
INSPIRED BY THE SOUL OF CHRIST TO LEAVE A LEGACY OF FAITH

# GIFTS OF BUSINESS INTEREST

When the time comes to transfer or sell your business, there are tax and practical reasons for including the Catholic Foundation of Southeastern Massachusetts for the benefit of the Diocese of Fall River including its parishes, Catholic schools, and Catholic organizations.



## HOW IT WORKS

- You give shares of closely-held stock to The Catholic Foundation.
- The Catholic Foundation may hold the shares and collect the dividends, or it may offer the stock back to your company for redemption or re-purchase. The Catholic Foundation will apply dividends or the proceeds to the purposes you wish to support.

## BENEFITS

- You receive gift credit and an immediate income tax deduction for the current market value of your shares.
- You pay no capital gains tax on appreciation of the shares.
- Under certain conditions, you may be able to use closely-held shares to fund a charitable annuity or trust that returns retirement income to you.
- You can make a significant gift that benefits both you and The Catholic Foundation during your lifetime without using your cash reserves to do so.

For more detailed information on making a gift to the Catholic Foundation for the benefit of the Diocese of Fall River, please contact us so that we can assist you through every step of the process.

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