

Making a Gift via Donor Advised Fund

The Archdiocese of Indianapolis can help Central Indiana Cursillo Center with the acceptance and processing of gifts from Stocks, IRA Qualified Charitable Distributions and Donor Advised Funds. Donor forms and instructions for each type of gift can be found [HERE](#). The specific links are listed in top right-hand corner of the page.

Since Cursillo falls under the archdiocesan umbrella, it is easiest for ArchIndy and Cursillo to allow the Office of Stewardship and Development to cash the IRA and DAF checks, document the gift in the donor's record, distribute funds to Cursillo and send the donor the appropriate tax language. That takes all IRS responsibility off Cursillo and puts it on ArchIndy. **(The checks are made payable to the Archdiocese of Indianapolis and the donor completes a letter of intent that directs us to release funds to Cursillo.)** Cursillo will receive notification when funds are distributed that includes donor contact info for Cursillo to send a thank you letter that does not contain tax language.

The archdiocese has a process for gifts of stock. Please refer donors to the link listed above. For additional questions they can call or email me. OSD receives the proceeds from Morgan Stanley, documents the gift in the donor's record, distributes funds to Cursillo and sends the donor the appropriate tax language. Again, this process takes all IRS responsibility off Cursillo and puts it on ArchIndy. Cursillo will receive notification when funds are distributed that includes donor contact info.

When OSD processes gifts for Cursillo, Cursillo's responsibility would be to:

- provide donors with the link to the online instructions and forms
- ensure that all checks sent directly to you are delivered to OSD for timely depositing
- send thank you letters to donors that do not include tax language

Please instruct your donor to have the check made payable to R. C. Archdiocese of Indianapolis. Your donor should also email me directly regarding the distribution of the funds. I understand that the financial institution does provide space for beneficiary info, but from time to time that information is not included on a check. Therefore, it is best to have duplicate information on file rather than not enough.

The check can be mail to:
R. C. Archdiocese of Indianapolis
Attn: Amy Higgins
1400 N. Meridian Street
Indianapolis, IN 46202

If you have any questions, feel free to contact me using the information below my signature.

Amy Higgins

Donor Relations Coordinator
Office of Stewardship and Development
Archdiocese of Indianapolis
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