

FELLOWSHIP LUTHERAN CHURCH

Donating stocks, bonds, mutual fund shares, etc.

One of the most beneficial ways for a donor to make a gift to Fellowship Lutheran Church is to donate appreciated securities including appreciated stocks, bonds, or mutual fund shares held for more than one year. These gifts entitle you to an immediate income tax deduction for the full fair market value of the securities and to bypass the payment of a capital gains tax on the transfer of the securities.*

The best stocks to donate are those that have increased greatly in value, particularly those producing low yields. If you own stock, which has dropped in value below your cost, you may want to consider selling it and donating proceeds from the sale to Fellowship. Selling the stock will enable you to claim a capital loss deduction on your income tax return, and donating the proceeds will allow you to claim an income tax deduction for your charitable contribution.*

The most common and convenient way to give securities is through electronic transfer from your brokerage account to Fellowship's brokerage account. You simply inform your broker or bank that you wish to give securities to Fellowship and state the number of shares you wish to give. Please instruct your broker or bank to transfer the securities into the account for Fellowship. For details on electronic transfer of securities, call Steve Camp at (918) 492-3698.

Stock certificates can be delivered to your local broker with instructions to hold for the account of designated project and instructions from Fellowship. You or your broker should immediately inform Fellowship that the stock is being held, and we will advise your broker concerning its disposition.

**The information on this page is not meant as tax advice. To fully understand any implications of your intended contribution for tax purposes, please consult a professional tax advisor.*