

Church of Saint Luke

Gifts of Stocks and Mutual Funds

Donating shares of stocks or mutual funds is a great way to support our Parish.

Bring Hope with your Gift of Stock

"We make a living by what we get. We make a life by what we give."

–Winston Churchill

Tax-wise Giving: Donating Stock

Are you interested in making a charitable gift that may yield double tax benefits and additional savings? If so, a gift of appreciated stock may be the right option for you.

A gift of stock may provide more benefits than a cash gift. When you make a gift of stock to the Church of St. Luke, by eliminating the capital gains tax that would be due upon selling the stock, you receive tangible tax-savings and benefits while also supporting our parish. A gift of stock may be right for you if:

- 1.** You are holding stocks that have risen in value. If your stocks are highly appreciated, you may find yourself with a hefty tax bill when it comes time to sell. By using these securities as a gift, you can avoid the capital gains tax on any paper profit.
- 2.** You would like to maximize your deduction while not affecting your liquidity. If you decide to make a gift of stock, you not only retain your cash assets, but you also receive a charitable tax deduction for the full fair market value of the stock that you've owned for more than one year.

Your gift of appreciated stock to The Church of St. Luke helps ensure our future.

Please contact the office for further information and details to take advantage of this opportunity to support our Parish.

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Donating a Gift of Stock Let's get started

Please Complete the information below:

STOCKS AND MUTUAL FUND DONATION FORM

FIRST NAME:

LAST NAME:

ADDRESS (STREET/CITY/STATE/ZIP):

EMAIL:

DO YOU WISH TO REMAIN ANONYMOUS: Y / N

WHAT IS THE APPROXIMATE VALUE YOU WOULD LIKE TO DONATE?

TICKER SYMBOL:

NAME OF SECURITY:

NUMBER OF SHARES:

WHAT IS THE NAME OF YOUR BROKER:

WHAT IS THE NAME OF YOUR BROKER'S FIRM:

FIRM PHONE NUMBER:

NOTES:

Church of Saint Luke

Wire Transfer Instructions

For those who wish to electronically transfer funds to St. Lukes, gifts may be sent via wire transfer. Please follow the instructions below, or reach out to stlukeellington@gmail.com if additional support is needed.

To make a donation from another broker, a parishioner would need to request a "Depository Trust Company (DTC) transfer" (normally just "DTC transfer") as a gift from their current broker to Fidelity. They need three pieces of information about Fidelity to make the transfer: our DTC number, the name of the church on the account, and the church's Fidelity account number.

Domestic (within the U.S.)

Bank Name: Fidelity's Depository Trust Company (DTC) number is 0226

St. Luke's Account name: Corporation

St. Luke's Account Number: Z73876593 (For Federal Wire and ACH transfers)