

APPRECIATED INVESTMENT EQUITY TRANSFERS (STOCKS, MUTUAL FUNDS, BONDS)

Investment equities with appreciated values (above cost basis) provide a tax-efficient way of donating to charity. The donor / taxpayer can transfer the equity directly to the church custodial account as a donation avoiding Capital Gains taxation.



Consult your investment and/or tax advisor for specific applicability to your situation.

- Equities shares must transfer directly to the church custodial account
- The church liquidates shares upon receipt proceeds used for ministry.
- An acknowledgement of equities and # shares will appear on your year-end contributions statement. The donor gift value is reported on your investment advisor's trade confirmation.

Steps to Donate Equities

1. Speak with your investment advisor to determine if donating equities provides a tax advantage in your situation.
2. To inform the church about your equity gift, contact Ted Dankovich in the church finance office by phone **864-268-2218 ext. 1205** or e-mail to tdankovich@mitchellroad.org
3. We will provide written transfer instructions to give to your investment advisor. If you have recommendations, we can discuss them at that time.

Timing

Equity gifts can be donated throughout the year. Frequently used as a year-end tax strategy, we recommend transactions be communicated with your investment advisor by December 20th each year.