

Appreciated Investment Equities (Stocks, Mutual Funds, EFT's, 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 will liquidate the equity shares upon receipt and use the proceeds for ministry.
- The value of the donation will appear on your year-end contributions statement.

3 Easy Steps to donate Equities

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

For more information or to clarify the process, please contact Ted Dankovich at the church business office 864-268-2218 ext. 1205 or by e-mail tdankovich@mitchellroad.org