



## MAKING DONATIONS TO YOUR CHURCH

# *Stocks & Bonds*

**GIVE STOCK. SAVE ON TAXES. GIVE MORE.**

As one of our free services, the Foundation can accept gifts of stocks and bonds to benefit United Methodist churches and ministries.

### Benefits of Giving Stocks and Bonds

- Receive a charitable income tax deduction for the current market value of the appreciated securities if your total charitable contributions exceed the standard deduction
- Avoid capital gains taxes on the sale of appreciated securities
- Further the mission of your favorite United Methodist church or ministry

### Steps for the Electronic Transfer of Stocks and Bonds

- Notify your broker of the stocks and bonds transfer and have them contact the Foundation office
- Fill out and submit the Securities Transfer Form
- Notify your church or ministry about the gift
- Receive a gift receipt for your charitable donation for tax purposes (based on the average stock valuation on the date the stock is received)



If you have any questions about gifts of appreciated securities, please feel free to contact the Foundation office at 334-793-6820 or email us at [foundation@alwfumf.org](mailto:foundation@alwfumf.org).