

# HOW TO GIVE GIFTS OF STOCK TO YOUR CHURCH FOR A CHARITABLE CONTRIBUTION



Give stock. Save taxes. Give more.

TMF, your United Methodist Foundation, offers a free service through which you can make a special gift or pay your pledge to your church or other United Methodist institution using securities.

TMF receives the securities, sells them, and then sends the proceeds to the intended recipient through appreciated stock.

By making such a gift, you escape the capital gains tax on the appreciation, and you have the benefit of a charitable deduction on your income tax of the current market value of the stock.

#### **FOLLOW THESE SIMPLE STEPS TO COMPLETE SUCH A GIFT:**

**You may contact Randi Forrest at TMF via phone (800.933.5502) or email (rforrest@tmf-fdn.org) and she will walk you through the process.**

**You may also visit TMF's web site at :**

**<https://www.tmf-fdn.org/loans-investing/gifts-of-stock/>  
and complete these steps:**

1. Fill out the Gift of Stock Letter of Instruction to your broker (form provided on the web site) noting your intentions to give and email it to Randi Forrest. Please feel free to contact Randi at 800-933-5502 with any questions.
2. Send the Gift of Stock letter to your broker.
3. Notify your church or other UM institution about the gift. They will provide you with the gift receipt for tax purposes.

To ensure you receive your tax deductions, make gifts by Dec. 31.

