



Consider Donating Appreciated Stocks/Bonds/Mutual Funds

You may want to consider donating stock, bonds or mutual funds that have appreciated to fulfill your Estimate of Giving or otherwise make a gift to the Church. *Gifts of stock may provide donors with a double tax benefit.* **First, you may be able to claim a charitable donation on the current amount of the donated stock, not just the amount you originally paid for it. Additionally, you may be able to avoid paying taxes on the appreciated value of the stock.**

There can be some tax consequences, so it makes sense to consult your tax advisor. Consider this approach to help Alpha Theta Presbyterian and save on your taxes.

Should you decide this is something you might want to do, please fill out the form below and return to Laura Moore, Finance Manager, in the church office: laura@alpharettapres.com.

Name _____

Address _____

City _____ State _____ Zip Code _____

Email _____ Phone _____

Where the security is currently held/Name of Brokerage _____

Name of security _____

Number of shares _____ Approximate value _____

Information for your broker:

Name: Alpha Theta Presbyterian Church, Inc.

DTC: 0164, Code 40

Account: 6436-2380

Charles Schwab & Co., Inc.

Orlando Operations Center

P.O. Box 628291

Orlando, FL 32862-8291

Please be advised that Alpha Theta Presbyterian Church, Inc. ("APC") may not be able to accept thinly-traded securities or mutual funds from fund families not handled by our brokerage house. APC's policy is to immediately sell all stock gifts and deposit the proceeds from the sale into the appropriate church account(s).