

# STOCK

## Giving

### Gifts of Appreciated Securities

Gifts of appreciated securities (stocks) are a popular alternative to making a cash gift as they may offer you additional tax advantages. In addition to receiving an income tax deduction for the full market value of the securities, you may also avoid capital gains on the appreciation of your stocks. If your donated securities are used to fund a charitable trust or gift annuity there may be estate and gift tax advantages as well.

To make such a gift, do not sell the stock and donate the proceeds, as this will jeopardize your tax benefits. Instead, notify your broker of your intention to transfer stock to Brookwood Church and contact Stacy Cook, Financial Services Specialist, [stacy.cook@brookwoodchurch.org](mailto:stacy.cook@brookwoodchurch.org).

When you contact us, please be prepared to provide your broker's name and telephone number, the name of the stock and number of shares you wish to contribute.

For questions or more information on making a gift of stock, please email Stacy Cook at [stacy.cook@brookwoodchurch.org](mailto:stacy.cook@brookwoodchurch.org).

#### Securities Transfers Instructions for Advisers:

**DTC Number:** 0705

**Account Number:** 18833424

**Taxpayer ID Number:** 57-1021565

#### Our Broker:

Scottrade, Inc.

1025 Woodruff Road, Suite D109

Greenville SC 29607

864.627.0063

877.542.8607