

## How Can We Help?

I would like someone to contact me about the benefits of giving stock to the EFCA.

- Please have someone contact me with more information.
- I would like to receive information on other charitable tax planning options.

The best way to contact me is by:

- Email
- Mail
- Telephone

Name \_\_\_\_\_ DOB / /

Name \_\_\_\_\_ DOB / /

Street \_\_\_\_\_

City \_\_\_\_\_

State/Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

Home Church \_\_\_\_\_

*Please complete and return. All inquiries are treated with complete confidentiality.*



## Giving Mutual Fund Shares

A gift of appreciated mutual funds may be an attractive way to support the mission and ministries of the Evangelical Free Church of America. It's smart, tax efficient, and makes a difference.

When you directly transfer ownership of mutual fund shares that you have owned for longer than a year, you will receive a charitable deduction for the full market value and incur no capital gains tax.

Mutual Fund companies have different procedures when transferring shares to charities. We will help you coordinate with your mutual fund company and meet their requirements.

Plan ahead. It may take two to four weeks to transfer the title from you to the EFCA.

Please contact Lisa Theurer or Lanny Harris at the EFCA to facilitate the transfer process and ensure your gift properly acknowledged.



## Taking a Stock Gift Further

If you want to know about other ways to give, ask us about how your stock can be used to support our mission. You can use it to fund a charitable gift annuity, charitable remainder trust, or charitable lead trust. These plans pay you income and provide additional tax benefits.

Call or email us to receive a free illustration of potential benefits for you.



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This information is not intended as tax, legal, or financial advice. Gift results may vary; consult your personal financial advisor for information specific to your situation.

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## HOW TO SAVE MONEY AND AVOID TAX WITH GIFTS OF APPRECIATED ASSETS



## GIFTS OF STOCK

Rather than sell your stock, consider giving some of it to the EFCA. You won't pay any taxes, and you receive an income tax deduction for your gift.





## BENEFITS OF USING STOCK

Susan purchased stock for many years. Over time the value of her stock grew and became a substantial investment.

Today Susan has more stock than she will ever need. Yet, she hesitates to sell it because she knows any sale will trigger an immediate capital gains tax. *What can she do?*

One of the best things Susan can do is transfer some of her stock to our ministry. By transferring rather than selling her stock, she avoids capital gains tax. Her gift will help to continue our mission for years to come. Susan also receives an income tax deduction for the full amount of the stock transferred.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

## Benefits of Giving Stock

Here are some of the benefits you can experience by making a gift of stock this year:

**AVOID** capital gains taxes up to 23.8%.

**RECEIVE** an income tax deduction for the full amount of your gift.

**MAKE** a meaningful gift with no cash out of pocket.

**PUT** your gift to work right away for the ministry causes you care about the most.

## Easier Than Writing a Check

A gift of stock can be made by taking a few simple steps:

**CALL** your broker or account administrator.

**SAY** you wish to make a direct transfer of appreciated securities to the EFCA Foundation, a ministry of the Evangelical Free Church of America.

**PROVIDE** them with the EFCA's Stock Transfer Instructions.

**Tell** the EFCA Foundation which stocks you want to give and the ministry or ministries you wish to support.

**WAIT** for your gift receipt in the mail.

## EFCA Stock Transfer Instructions

If you hold the stock certificates yourself, contact us. We will provide you with instructions and a mailing address to use. This will involve mailing the certificates and a completed stock power form in separate envelopes (by certified mail) on the same day.

If your stock is held by a bank or broker, it is important that you notify the EFCA Foundation in advance of making the gift of securities. Without this notice, your identity as the donor will be unknown, the gift will not reach your designated ministry, and a needed gift receipt will not be mailed.

Share this information with your broker or account administrator:

**Clearing Firm:** Charles Schwab & Company, Inc.

**DTC Number:** 0164

**Account Name:** Evangelical Free Church of America

**Credit to EFCA Account Number:** 91140796

**EFCA Broker Agent:**  
Anna Todorova | 303-296-7100

Inform the EFCA Foundation of your intentions. We need to know who you are, the number and type of shares, and the ministry or ministries you wish to support.

Questions may be directed to either of the following people:

**EFCA Donor Services:**  
Lisa Theurer | 800-745-2202 ext. 434

**EFCA Foundation:**  
Lanny Harris | 800-745-2202 ext. 417



## Benefits of Giving vs. Selling

GIVING	SELLING
No capital gains tax	Taxes up to 23.8%
Income tax deduction	No income tax savings
Avoid future investment costs	Continue to pay investment costs

