

# GIFT OF STOCK

Increase your charitable giving and your tax deduction at the same time!

Make a bigger impact in your charitable giving by donating gifts of appreciated stocks, bonds, and mutual funds directly to your preferred Episcopal charity or parish.

The Church Foundation's gift clearing account facilitates cash gifts as well as appreciated stock, bonds, and mutual funds to the Diocese of Pennsylvania, The Church Foundation, or any of the parishes, schools, and other institutions within the Diocese of Pennsylvania at no cost.

## How Does it Work?

- Go to [www.tcfdiopa.org/gifts-clearing/](http://www.tcfdiopa.org/gifts-clearing/)
- Download, print, and fill out the Gift of Stock and Designation Form
- Return a copy to The Church Foundation as directed on the form
- Return a copy to the donor's broker

After the donor's broker makes the trade, the shares will be transferred to The Church Foundation gift clearing account.

The assets are sold immediately, and a check for the trade amount will be sent directly to the designated beneficiary.

The Church Foundation then sends confirmation of the transaction and an acknowledgment letter to the donor, with a copy to the beneficiary.



## Benefits

- Avoid paying capital gains on the sale of appreciated stocks, bonds, or mutual funds.
- Receive a charitable tax deduction.
- Be a part of furthering the mission of your designated charity.

## Types of Gifts

- Cash
- Stocks
- Bonds
- Mutual Funds



## The Church Foundation

STRONG FOUNDATION. FAITHFUL INVESTING.

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