



## Making Gifts of Stock or Securities to Federated Church

---

Making a charitable gift of stock or securities to Federated Church is convenient, easy and economical. When you make a gift of stock, held longer than one full year, you receive a charitable income tax deduction for 100 percent of the market value of the stock, including capital appreciation. This allows you to potentially avoid the capital gains tax you would likely owe, if the stock were to be sold.

Gifts of stock may be given in the following manner:  
(Consider the highest appreciated stock first, as long as the stock has been held for 12 months or longer.)

- If you hold the certificates on the stock, you can direct the company to reissue some shares in the name of Federated Church.
- If your financial advisor holds the certificates, you must send your broker a letter signed by you (and your spouse if held jointly) indicating how many shares you wish to transfer to Federated Church in one of the following ways:
  - Issuing a new certificate to Federated Church  
OR
  - Transferring shares electronically to Federated Church

*Federated Church is a not-for-profit charitable 501(c)3 organization. All contributions are tax deductible within the limits of the law.*

### Valuation

For publicly traded securities, the value of the gift is the average of the high and low on the date it is transferred. The transfer date is the date on which the donor irrevocably parts with the securities. This is usually either the date of the electronic transfer or postmark.

**As always, please check with your tax advisor  
before entering into a gift arrangement.**

Your financial advisor will need the following information:

Bank: Fidelity Investments  
Phone: 800-544-6666  
DTC #: 0226  
Account #: Z49-597350  
Tax ID or EIN: 34-0714401

**Beth Rutkowski**  
Senior Director of People and Operations  
Federated Church  
76 Bell Street, Chagrin Falls, OH 44022  
Phone: 440-247-6490  
Email: [brutkowski@fedchurch.org](mailto:brutkowski@fedchurch.org)