



WORKFAITH



DONATE STOCK

and help provide faith-based training and coaching to anyone who desires long-term employment!

**MAXIMIZE IMPACT AND
MINIMIZE TAXES!**

**GIVE SMART,
SAVE MORE**

Maximize
Tax Savings!

Donate
Stock

Donate
Cash



Benefits of Donating Stock:

- Avoid capital gains tax
- Deduct the full value of stock
- Nonprofit receives pre-tax gift

**DONATE STOCK TO
MAXIMIZE TAX SAVINGS**

Say you have \$5,000 worth of stock (\$4,000 in gains).
Rather than selling the stock to donate to your
favorite nonprofit, you can donate the stock and save
on taxes!

Sell Stock: pay \$1,200 in taxes

Assuming 30% in capital gain tax

- OR -

Donate Stock: save \$1,200 in taxes

Avoiding 30% in capital gain tax



DONATE STOCK

Thank you for your interest in donating stock to The WorkFaith Connection. It is an honor to be blessed through your generosity and obedience to the Lord to steward your resources to further the work HE is doing through WorkFaith. We pledge to be good stewards of your gifts, taking great care in how we manage and track the resources entrusted to us.

TO DONATE STOCK TO THE WORKFAITH CONNECTION

1. Notify Morhielely Sanchez, Development Coordinator of Your Transfer.

The WorkFaith Connection uses the services of National Christian Foundation to process donated investments. **Morhielely Sanchez, Development Coordinator**, will be able to assist you with your donation or if you have any other questions or concerns. She can be reached at msanchez@workfaith.org OR 713.401.9630.

2. Initiate the Transfer with Your Broker.

To transfer stocks or mutual fund that are being held electronically, contact your financial institution and provide the information with the instructions below. Include the givers name and NCG Giving Fund number (#2050843) on all deliveries.

Deliver all DTC Eligible Securities to:

DTC Clearing 0026

National Christian Foundation Services, LLC (Fidelity)

For the account of National Christian Charitable Foundation

Account Number 479-048720

If your account is with one of the brokerage firms below, please use the respective company to contribute to an NCF account:

FidelityAcct# 479-048720 (DTC 0226)

SchwabAcct# 6595-8708 (DTC 0164)

Merrill LynchAcct# 210-04116 (DTC 8862)

TD AmeritradeAcct# 901694820 (DTC 0188)

3. Notify NCF of Your Transfer.

Please complete the Letter of Intent (LOI) on the next page of this document and send to NCF via email, mail, or fax. It can be printed and completed by hand or you can type directly into the fields and save to your computer before sending.

Email: transfers@ncfgiving.com

Mail or Overnight Delivery: National Christian Foundation

ATTN: Contribution Services

11625 Rainwater Drive, Suite 500

Alpharetta, GA 30009

4. Confirm Your Transfer

Transfers must be initiated by your financial advisor or broker. Please confirm with your broker or advisor that your contribution has been transferred from your account to Work Faith NCF's account. Once received, it usually takes 4-7 business days for your transfer to be liquidated, settled, and completely posted to WorkFaith's NCF account.

YEAR END RECEIPTS

You will receive a receipt of your tax-deductible gifts in accordance with IRS requirements. To be considered a gift in the current year, the transfer of your stock to a WorkFaith account must be accomplished before midnight on December 31. If transferred by December 31st, it will be a current year gift, even if WF receives the proceeds of the sale of that stock in January.