



A GUIDE TO GIVING STOCK *and* APPRECIATED SECURITIES

Transforming Your Assets Into Eternal Impact

Wise stewardship often involves more than just cash. For many, the greatest potential for significant generosity lies in assets that God has blessed them with over many years, such as stocks and securities. This guide provides a brief overview of how you can turn a portion of your portfolio into a powerful gift for the Kingdom.

What are the Benefits of Giving Stock?

When you donate stock that you've held for more than one year, you can unlock two significant tax benefits:

- **Avoid Capital Gains Tax:** You are not required to pay capital gains tax on the appreciation of the stock.
- **Receive a Fair Market Value Deduction:** You are eligible for a tax deduction for the full fair market value of the stock at the time of the gift.

These two benefits combined often mean you can make a larger gift at a lower original cost to you.

From Portfolio to People: A gift of appreciated stock is one of the most effective ways to provide critical resources for our ministry among unreached people groups. For example, a gift of stock valued at \$15,000 can provide the funding needed to support a national church-planting team for an entire year.

How Do I Make a Gift of Stock?

Step 1: Contact your broker or financial advisor and instruct them to initiate a transfer.

Step 2: Provide them with the following information for SEND International:

- **Brokerage Firm:** Charles Schwab
- **Account Name:** SEND International of the United States, Inc.
- **Account Number:** 2706-9356
- **DTC Number:** 0164

Step 3: Please *notify* us before or at the same time you initiate the transfer. This is very important, as brokers often do not include donor names. Notifying us ensures we can identify your gift and provide you with a prompt and accurate tax receipt.

Disclaimer: *The information in this guide is not intended as legal or tax advice. We encourage you to consult with your own professional advisor for advice on your individual situation.*



Questions? Please contact

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