



# Donating Appreciated Stock

If you would like to support the work of First Community Foundation and have appreciated shares of stock, your broker can transfer shares from your account (up to 30% of your adjusted gross income) to the Foundation's brokerage account. This provides you with a dual benefit. You don't have to claim the capital gain on appreciated shares and you can claim the total value of the stock, on the date of transfer, as a charitable contribution.

The Foundation will accept gifts of appreciated stock to our general fund or to a fund that aligns with your interests. Please note the transfer instructions below. For assistance in setting up the transfer or in matching your interests to an existing fund, please contact Rev. Seth Stearns, Foundation Director.

## 1. Gather Brokerage Information

Your broker will need the following details to complete the security transaction.

First Merchants Bank		
Account Name:	First Community Church of Columbus, OH	
Account Number:	2US17869	
DTC:	0701	
Contact:	Dan Lewis 219.513.5114	
Church Contacts:	Liz Compton <a href="mailto:lcompton@fcchurch.com">lcompton@fcchurch.com</a> 614.488.0681 ext.237	Patti Link <a href="mailto:plink@fcchurch.com">plink@fcchurch.com</a> 614.488.0681 ext.251

## 2. Inform Us of Forthcoming Transfer

Please let us know that a transfer is forthcoming, so we can identify it and properly apply your gift as you intend. Please include the following information.

- Name and address of donor
- Stock name or trading symbol
- Number of shares or approximate dollar amount
- Foundation destination fund (missions, Akita, music ...)

Our policy is to sell the securities on the date of receipt, or as soon as possible after that date. According to IRS requirements, the value of the stock is determined by averaging the high and low value on the date it is sold. Once the transfer is made, the stock will be sold, and a check issued to the Foundation. You will receive a letter from the Foundation acknowledging your gift.

Please provide duplicate notification to Rev. Seth Stearns, Foundation Director at 614-488-0681 ext. 287 or [sstearns@fcchurch.com](mailto:sstearns@fcchurch.com).

**We greatly appreciate your considering a gift to First Community Foundation.**

*Please consult your financial professional or tax advisor when considering the amount and timing of your charitable gifts.*