

Give Appreciated Stock or Mutual Fund Shares

When most people think of donations, they think of cash donations. But when it comes to charitable donations, there may be another way. Church of the Resurrection (COR) of course, always appreciates and encourages cash donations – but cash donations often affect your cash flow and usually represent after-tax dollars.

Donating appreciated stock or mutual fund shares represent a great way to donate while also saving on taxes. Some of the benefits of donating appreciated stock or mutual fund shares can be:

- Avoid Capital Gains or ordinary income Tax of 18.8% - 40%
- Deduct the fair market value of the stock (regardless of your cost basis)
- Have greater impact by having COR receive full value of your gift, rather than the IRS taking their portion

Gifts of appreciated stock or mutual funds to COR is an easy and fast method to donate. It is a simple transaction to transfer shares from your Brokerage account to COR's account. The transfer usually takes 3-4 business days and with most brokerage services is an online form.

Join the growing number of members that are donating shares from brokerage accounts to COR and avoiding taxes on the transaction.

Instruct your brokerage firm to transfer stock / mutual fund securities to:

Receiving Firm: Charles Schwab & Co., Inc

Deliver to: DTC Clearing 0164, Code 40

Tax ID #: 31-1640316 (Schwab's ID if needed by your brokerage firm)

Account Number: – 8831-8885

Account Name: The Episcopal Church of the Resurrection

Tax ID: 94-6050228

Address: 399 Gregory Lane, Pleasant Hill, CA 94523

Contact Name at Charitable Organization: Tim Repp

Contact Phone: 925 570-4691

Please include Charitable Donation in the delivery instructions.

Please email Tim Repp when you instruct your brokerage firm to transfer shares so you can be credited for the donation, or with any questions on your donation:

trepp@comcast.net

925 570-4691 - mobile

925 827-4396 - home