



## Stock Transfer to

# First Baptist Church

99 North Salisbury Street Raleigh, North Carolina 27603

**Thank you for considering a stock donation to First Baptist Church.**

Please follow these simple steps to notify First Baptist Church of Raleigh of your donation so that it can be properly attributed to your contributions.

1. Please contact your broker to initiate the transfer of your securities to First Baptist Church.
2. Please contact the First Baptist Church Financial Administrator (919-832-4485, ext. 210 or [financeadmin@fbcraleigh.org](mailto:financeadmin@fbcraleigh.org)) and you will be given information needed for your financial advisor to make the transfer. We will not give this information electronically, so please give us a phone number for a return call should you leave a message or email us. Also, please contact us personally for the information, not through your financial advisor/broker, so that we can answer any additional questions you may have and to be sure the transfer of securities has been authorized by you.

3. Please complete the form on the next page at the time of the gift transfer so we can accurately identify and acknowledge your gift. **Please use a separate form for each security transfer. Please return this form through the mail or electronically to:**

Burke Raper - Financial Administrator - First Baptist Church - 99 N. Salisbury Street - Raleigh, NC  
E:mail [financeadmin@fbcraleigh.org](mailto:financeadmin@fbcraleigh.org)

4. We can only identify you as the donor of gifted securities if you inform the Financial Administrator of the upcoming transfer. Once informed of the transfer, a review of the church's brokerage account will be made daily. When the security transfer takes place the gift will be recorded and an acknowledgement letter will be sent in a timely manner.

### Stock Transfer Information

#### **Valuation**

The value of your gift will be the average of the high and low trading prices on **the date First Baptist Church receives your gift.**

#### **Benefits**

Gifts of stock made to First Baptist Church give donors a tax benefit, whether sold at gain or at loss. It is important, however, to keep in mind that procedures for giving stock to charitable organizations may differ depending your financial situation and whether there is a gain or a loss on the stock. Your financial advisor can advise you on what is best in your circumstance.

**Policy of Church in regards to selling stock:** It is the policy of the church to immediately sell any stock that is received. We will not "play the stock market" with your transfer.

**Acknowledgement of gift by Financial Administrator:** The donor will be mailed an acknowledgement letter from the Financial Administrator specifying the receipt of the securities and the date received into the church's brokerage account. Please note that this acknowledgement letter will serve as your receipt for tax purposes and as verification that no goods or services were provided in consideration of this gift other than intangible religious benefits.

**Record of the contribution:** In accordance with guidelines published by the *Internal Revenue Service* your gift of stock will be recorded as a non-cash gift, or a gift of property to the church. Contribution statements are to indicate that the gift was one of property and not cash. The church in turn sells the stock and receives the cash benefit. Therefore, your contribution statement will not reflect a dollar value for the gift. However, it should reflect the receipt of the actual gift of stock by name and indicate the number of shares gifted.



# First Baptist Church

Stock Transfer to

99 North Salisbury Street

Raleigh, North Carolina 27603

## FIRST BAPTIST CHURCH Stock Transfer Information Form

(to be completed by donor or broker)

Your Name and Address:

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E:mail \_\_\_\_\_

### Securities Gifted

Name of security \_\_\_\_\_ Number of shares \_\_\_\_\_

Date/Anticipated date of Transfer: \_\_\_\_\_

The gift should be applied to the following:

Purpose: \_\_\_\_\_ Set Amount \_\_\_\_\_ or Percentage: \_\_\_\_\_

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Purpose: \_\_\_\_\_ Set Amount \_\_\_\_\_ or Percentage: \_\_\_\_\_

Purpose: \_\_\_\_\_ Set Amount \_\_\_\_\_ or Percentage: \_\_\_\_\_

Purpose: \_\_\_\_\_ Set Amount \_\_\_\_\_ or Percentage: \_\_\_\_\_

Purpose: \_\_\_\_\_  Any Amount not distributed in the above designations

Any Other Special Instructions \_\_\_\_\_

Transferring Broker \_\_\_\_\_ E:mail \_\_\_\_\_

Company \_\_\_\_\_ Phone \_\_\_\_\_

Signature of Broker or Donor informing First Baptist Church of the intended transfer of stock with the understanding that the stock will be sold quickly and distributed to church accounts as instructed above:

\_\_\_\_\_

Signature