

Many of you donate stock to fulfill your pledge. So that we can be sure the donation is properly applied to you, we developed a form for you to fill out advising us of the donor, the name of the stock, the numbers of shares, and the broker you are using to transfer the stock. These forms can be found in the church office. We have attached to this form a list of our designated brokers with account numbers, contacts, and phone numbers.

If you have any questions at all concerning these transfers, please do not hesitate to call and speak with our controller. Thank you for your continued support of Skidaway Island Methodist Church.

## EQUITY GIVING

Donating appreciated securities to our church is a tax efficient way to fulfill your pledge or to make a specific gift to the church. The donor can take a charitable deduction for the market value of the securities given, and pay no capital gains taxes on the appreciation of those securities. In order to make this a tax-free transaction, the donor must have his or her broker transfer the stock to one of SIMC's accounts, or personally deliver the stock certificate to one of the brokers with whom we have an account. Do not have the stock sold in your account and transfer the funds to our account. This will result in a taxable transaction for the donor.

The church has accounts with these local brokerage firms:

<u>COMPANY</u>	<u>DTC #</u>	<u>ACCT #</u>	<u>CONTACT</u>	<u>PHONE</u>
MERRILL LYNCH 3 Skidaway Village Square 31411	8862	69Z04012	SCOTT HOWARD	598-3811
STERNE AGEE 15 Lake St. Suite 200 31411	0750	SW78-75493440	TERESA	598-8998
FIDELITY INVESTMENTS P. O. Box 770001 Cincinnati, OH 45277	0226	Z46-109231		800-544-6666

Please advise the Controller at the church by letter of the number of shares, the name of the stock, and how the gift is to be assigned (pledge, restricted fund or specific purpose).

If you have any questions, please contact the Controller.

01/2016  
12/16/2020  
8/16/2023



*Seaside Island*  
METHODIST CHURCH  
54 DIAMOND CAUSEWAY  
SAVANNAH, GA 31411

## STOCK DONATIONS

Today's Date: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name of Stock to be donated:

\_\_\_\_\_  
\_\_\_\_\_

Number of Shares: \_\_\_\_\_

Your Broker: \_\_\_\_\_

SIMC Broker (see attached listing): \_\_\_\_\_

Special Notes:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please return this form to our Controller at the church office.