

— Touching the lives of the lost and enriching the faith of the found. —

HOW TO MAKE A STOCK DONATION

A gift of appreciated publicly traded securities can be a simple, tax-smart way to support the mission of Touching Lives.

1. Contact Touching Lives before initiating the transfer.

Email accounting@touchinglives.org and request the current stock-transfer instructions. Touching Lives will provide the brokerage firm name, account name and number, and DTC number your broker will need.

2. Ask your broker to transfer the shares.

Give your financial advisor or brokerage firm the transfer instructions supplied by Touching Lives.

3. Let Touching Lives know your gift is coming.

Stock transfers often arrive without the donor's name. Please call 1-800-413-1131 with your name, mailing address, phone or email, the security name, number of shares, and expected transfer date. This allows Touching Lives to identify and acknowledge your gift promptly.

4. Keep your acknowledgment and consult your advisor.

After the gift is received, Touching Lives will send an acknowledgment describing the securities and the date received. Your tax advisor can help determine the value of the charitable deduction and whether a stock gift fits your financial and tax circumstances.

Questions? Call Touching Lives at 1-800-413-1131.

This material is for general informational purposes only and is not legal, tax, or financial advice. Please consult your professional advisors regarding your individual circumstances.

