Direct Stock Donation

Lanier United Methodist Church

Giving method — summary, workflow, and forms

Disclaimer: This church does not provide tax, legal, or investment advice. Consult your tax advisor, financial planner, or attorney. Rules change; verify current IRS and state law.

Summary of this giving method

A direct stock gift is a transfer of appreciated securities to the church's brokerage account before you sell the shares. When IRS rules are met, itemizers may qualify for a deduction based on fair market value, and capital gains on the appreciation may be avoided — your CPA confirms. The church receives the shares and follows policy for sale or holding.

What the giver needs to do

- Contact the church office before transferring so the gift can be identified.
- Do not sell the stock yourself; instruct your broker to transfer shares in kind using church instructions.
- Complete the donor notice form and retain the church's written acknowledgment.

What the church needs to do

- Maintain a brokerage account (often via foundation) and issue clear DTC / transfer instructions.
- Provide timely written acknowledgments that meet IRS substantiation rules.
- Process gifts per investment and liquidation policy.

Direct Stock Donation Form — fill in and return as indicated

Use the sections below. Some fields are for the giver, some for the church office or treasurer.

Brokerage / DTC instructions (church office completes, gives to donor)

Receiving firm: ___________________________

DTC number: ___________________________

Account name: ___________________________

Account number: ___________________________

Reference / FFC (if required): ___________________________

Donor notice of securities transfer (giver completes before/after transfer)

Donor name(s)	
Donor brokerage firm	
Security (e.g., ticker)	
Approx. shares and value	
Expected transfer date	
Giving Designation (General / other)	

Giver signature: ____ Date: ___________

Church use only — acknowledgment / processing

Date gift received: __________ Acknowledge letter sent: ________ Liquidation date: __________