

**Did you know that St. Mark's United Methodist Church accepts gifts of stock? It's a great way for you to help the Church and provides many personal financial benefits to you**

***What are the advantages of giving stock including mutual funds for you?\****

- While assisting the church, you do not pay capital gains on the increased value of the stock.
- With the current strong market, increased support of the church is Possible.
- Not only is there a saving of income tax on the capital gains; the full amount contributed is also a deduction when filing income tax returns.
- Gifts of stock preserves cash flow for personal expenses.

**St. Mark's United Methodist  
4601 Fairfield Avenue, Fairfield, Ohio 45014  
(513)844-1818**



**ST. MARK'S**  
UNITED METHODIST CHURCH

**STOCK**

**DONATIONS**

### ***Can you give me an example of how this works?***

- You bought a stock years ago at \$20.00 per share.
- The stock now sells for \$50.00 per share.
- You can donate the stock to St. Mark's and the church receives \$50.00 per share.
- You typically do not pay taxes on the \$30.00 gain in share price.
- You typically can earn a tax deduction on the full \$50.00 per share as a charitable contribution.

### ***What does St. Mark's do when it receives a stock donation?***

- When St. Mark's receives a stock donation, it seeks to immediately sell the stock to convert it to cash. This allows the funds to be used for the mission of the church.
- St. Mark's does not and will not "play the market" in an attempt to increase the value of the stock.

### ***How does St. Mark's handle stock donations?***

- St. Mark's has partnered with the West Ohio Conference's Council on Development to handle the transfer of stock from a member to a church, liquidate the stock and issue a check directly to the church.

### ***What are the advantages for the church to utilize the Council on Development for these transfers?***

- The church does not have to set up a separate account with a brokerage firm.
- There are no sales fees diminishing the final contribution.
- The West Ohio Conference Council on Development provides the required charitable tax reporting for the individual while providing a note of appreciation on the church's behalf.
- If the donor so desires, the gift can be anonymous.

### ***What are the steps to donate stock to St. Mark's?***

- Either the individual or the church notifies the Council on Development of the upcoming stock transfer. Please provide the name of the stock and if possible the number of shares.
- The individual has their broker transfer the stock utilizing the following information:

Morgan Stanley  
Attn: Angela Lawson  
7755 Montgomery Road  
Cincinnati, OH 45236  
Account Name: West Ohio Conference  
Account #285-105483-302  
DTC # 0015  
Telephone # 513-762-5291  
E-mail: [angela.l.geracilawson@mssb.com](mailto:angela.l.geracilawson@mssb.com)

Got Questions? We can answer them.

Contact Tim Mislansky, Finance Chair at [tmislansky@fuse.net](mailto:tmislansky@fuse.net) or 937-657-4827.

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