

How Do I Donate

STOCKS AND SECURITIES?

Resurrection Lutheran Church has been blessed to receive donations of Stocks and Securities in a variety of ways. Therefore, there is no one avenue to walk and some options are listed below. We do ask that you **notify us** when initiating a transfer of stocks or securities so that we may properly process your donation. Questions may be directed to Finance@RLCary.org.

Please be aware that for RLC to grant a tax credit receipt in the current year, end-of-the-year donations of stocks/securities should be initiated before December 10. This will allow time for the paperwork to be processed and your donation to be received at RLC before December 31, generating your receipt.

Info you will need:

Name: Resurrection Lutheran Church
Tax ID: 58-1326861
Address: 100 Lochmere Drive West
Cary, NC 27518
Telephone: 919-851-7248 ext. 36
FAX 919-851-6411

For Certificates in Hand:

Proper endorsement is required on the back in the presence of a *special* notary, normally found at banks (Medallion Notary). Once given to RLC, a release form may need to be signed in order to liquidate.

Brokerage to Brokerage Accounts:

While accounts for Resurrection Lutheran Church have been established at the following firms, none are exclusively endorsed by RLC:

<u>Wells Fargo</u> (formerly Wachovia Securities) Tom Gebbia Thomas.Gebbia@wellsfargo.com	919-290-2159	Acct. #5324-4109 DTC #0141
<u>Edward Jones</u> Financial Advisor: Michael Stone	919-552-4520	Acct. #390-15924-1-4 DTC #0057
<u>Thrivent Investment Management</u> www.thrivent.com	1-800-847-4836	Acct. #21-990027030

You may also want to be aware of another avenue for your charitable contributions.

Fidelity Investments and Schwab have Charitable Gift Funds. Each is a public-charity and donor-advised fund. Once you open a Giving Account, they will process the donation of stocks and securities for you in the name of **charitable giving**. These Charitable Gift Funds will provide **grants** to non-profit, charitable organizations, upon your recommendation, as long as you have a Federal Tax ID number for your charity. RLC also receives grants from the participants of these Funds. With this avenue, your tax credit receipt will come from the Charitable Gift Fund, while RLC will receive a check.

For info on Fidelity Investments, explore www.charitablegift.org or call 1-800-952-4438.

For info on Schwab Fund, view www.schwabcharitable.org or call 1-800-746-6216.

You may also contact Thomas Gebbia at Wells Fargo for a Donor-Advised Fund at 919-290-2159.

Required Minimum Distribution (RMD) Qualified Charitable Distribution (QCD)

It is currently possible to transfer funds from IRA's to a Charity with no tax penalty. Payment must go directly to the charity. Contact the agency holding your funds, as they may have forms to be completed. We're happy to help, if you need assistance.

RLC Finance Team
Phone: 919-851-7248 x 36
Email: Finance@rlcary.org

Lisa Snyder, Treasurer
Janet Bowling, Bookkeeper

Ginny Bastante
Carol Bostick