



St. Michael's Lutheran Church

ELCA

1660 West County Road B • Roseville, Minnesota 55113 • 651/631-1510

Stock Transfer Form

Please follow these simple steps to notify St. Michael's of your donation so that it can be properly attributed to your contributions.

- 1.) Contact your broker to initiate the transfer of your securities to St. Michael's Lutheran Church
- 2.) Please complete this form at the time of the gift transfer so we can accurately identify and acknowledge your gift. Send this form to:

Kathy Harris
 St. Michael's Lutheran Church
 1660 West County Road B
 Roseville, MN 55113
 Phone: 651-631-1510
 Fax: 651-697-1293
 or e-mail the information to kathy@stmichaelselca.com.

Your name and address:

Securities Gifted

Name of securities _____ Number of shares _____

Date of Transfer _____

Special Instructions _____

Transferring Broker _____

Company _____ Phone _____

Electronic Transfer Information

St. Michael's Broker: Feitl and Company
 National Financial Services for the Benefit of St. Michael's Lutheran Church
 DTC #0226
 St. Michael's Account Number is D1N-005770

Contact: Doug Pritchard at 651-766-1280 or 651-402-4188 (Cell)

Stock Transfer Form-contd.

Valuation

The value of your gift will be the average of the high and low trading prices on the date St. Michael's receives your gift.

Benefits

Gifts of stock made to St. Michael's give donors a double tax benefit, whether sold at gain or at loss. It is important, however, to keep in mind that procedures for giving stock to charitable organizations differ depending on whether there is a gain or a loss on the stock.

Stock Gains: To make a gift of appreciated stock to St. Michael's, under no circumstances should you sell your securities first, or you will have to pay capital gains on the sale. By transferring the stock to St. Michael's you will pay no capital gains tax on the transfer. In addition, you can also take a charitable tax deduction for the value of your stock.

Stock Losses: To make a gift of stock or mutual funds for which you have a loss, simply sell the securities first and then contribute the proceeds to St. Michael's. In this way, you can take a capital loss on your tax returns and take a charitable deduction for your cash contribution to the church.

Note: It is the policy of the church to immediately sell any stock that is received.