



YOUR GIFT PLANNING JOURNEY

GIFTING STOCK, SECURITIES, OR MUTUAL FUNDS

Transform lives for years to come

PART I

Gift your stock, securities, or mutual funds

If you're looking for a tax-smart way to share your blessings with children and families, consider a gift of stock.

When you give appreciated stock you've owned for more than one year, you can avoid capital gains tax and receive a charitable income tax deduction when you itemize.



I'm telling the solemn truth: Whenever you did one of these things to someone overlooked or ignored, that was me—you did it to me.

MATTHEW 25:40 MSG

HOW IT WORKS

CONVERTING TO MINISTRY DOLLARS

The National Christian Foundation West Michigan assists Bethany to convert stocks into ministry dollars that support our work with children and families.

YOUR GIFT RECEIPT

Your gift receipt will come from the National Christian Foundation and will include: a description of your gift, the date your gift was received, the number of shares sold, the total dollar value of the shares, and confirmation that Bethany Christian Services has received the proceeds from the sale.

YOUR TAX BENEFITS

Your gifts of appreciated stocks often provide significant tax benefits. Contributions of appreciated stock held for more than one year are generally deductible at market value. Accordingly, you avoid the capital gains tax.*

LETTER OF INTENT

To initiate the process of electronically transferring stocks, securities, or mutual funds to Bethany, your broker must complete the Letter of Intent and send it:

Attention: Bethany Christian Services,
Gift Planning Ministry

LETTER OF INTENT (LOI) continued

I/we irrevocably transfer the following assets:

___ Cash Contributions \$ _____

___ Stocks, mutual funds, or other publicly traded assets listed below

DESCRIPTION OF ASSETS/NAME OF SECURITY SYMBOL EXACT # OF SHARES* APPROX \$ VALUE

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*Please initiate the transfer based on the number of shares and not the dollar value since security values may fluctuate. Shares are to be transferred in kind and are not to be liquidated.

SIGNATURES

GIVER 1: FULL NAME (PLEASE PRINT)

GIVER 1: SIGNATURE

DATE

GIVER 2: FULL NAME (PLEASE PRINT)

GIVER 1: SIGNATURE

DATE

PLEASE COMPLETE BOTH SIDES OF THIS FORM AND SEND TO:

Gift Planning Ministry, Bethany Christian Services,
901 Eastern Avenue NE, PO Box 294, Grand Rapids MI 49501-0294

OR DOWNLOAD A DIGITAL PDF AT BETHANY.ORG/LOI

LETTER OF INTENT (LOI)

I understand that to initiate this contribution, I must complete this form or my broker's form and submit to my broker. I also understand in order for Bethany Christian Services to receive the proceeds, I need to email this form or my broker's form to GiftPlanning@Bethany.org.

Please accept this letter as my intent to irrevocably transfer securities from my brokerage account to National Christian Charitable Foundation, Inc.

MY NAME

MY EMAIL ADDRESS

MY PHONE #

The broker who will be delivering the securities to National Christian Charitable Foundation, Inc is:

NAME OF BROKER

BROKER PHONE #

MY ACCOUNT # AT BROKERAGE

The above broker will deliver the shares to one of the following National Christian Charitable Foundation, Inc brokerage accounts (pick one below):

_____ via DTC #0226 **National Financial Services (Fidelity)** Account #479-048720

_____ journaled to **Merrill Lynch** Acct# 210-04116 (DTC 8862)

_____ journaled to **TD Ameritrade** Acct# 901694820 (DTC 0188)

_____ journaled to **Schwab and Co** Acct# 6595-8708 (DTC 0164)

Anticipated date the securities will be transferred to **National Christian Charitable Foundation, Inc.** is ____ / ____ / _____

When the securities arrive at one of the above brokerage accounts, please move the proceeds to:

Bethany Christian Services Single Charity Fund # 1327718

The receipt should be made out to (individuals/entities/trusts):

NAME SHARES ARE REGISTERED IN

STREET ADDRESS

CITY, STATE, ZIP

PLEASE COMPLETE BOTH SIDES OF THIS FORM AND SEND TO:

Gift Planning Ministry, Bethany Christian Services,
901 Eastern Avenue NE, PO Box 294, Grand Rapids MI 490501-0294

GIVE THE GIFT OF HOPE

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At 13 years old, Julia was trafficked for labor by her stepfather's family. Her foster family gave her a loving home and helped her get an education. She reflects, "The most surprising thing [about my journey] is that people who weren't my family, who didn't even know me, would care for me. I've learned that family is who cares for you."



FIND MORE INFORMATION AND RESOURCES AT

**Bethany.org/GiftPlanning
Bethany.org/LOI**

CORPORATE HEADQUARTERS

**901 Eastern Ave NE, PO Box 294
Grand Rapids, MI 49501-0294**

(800) BETHANY

This information is not intended as financial or legal advice. Always consult with a professionally licensed tax advisor or estate attorney before making decisions.