

# **Christ Community Church**

## **THE BENEFITS AND PROCESS OF GIVING MARKETABLE SECURITIES**

### **THE BENEFITS**

You will receive a tax deduction for the fair market value of your securities at the time of donation, and you will pay no capital gains tax on the difference between your cost and the fair market value.

### **THE PROCESS**

1. Complete the appropriate form on the following pages.
2. Send your broker a copy of the appropriate form to authorize the transfer.
3. Send an electronic copy/scan to Christ Community Church - ATTN. Finance Team to [finance@ccclife.org](mailto:finance@ccclife.org), letting us know how you would like the funds applied.

# GIFT OF STOCK - ELECTRONIC

(This form **CANNOT** be used to transfer Mutual Funds)

## DONOR INFORMATION

Owner | Co-Owner \_\_\_\_\_

Address \_\_\_\_\_

City | State | Zip \_\_\_\_\_

Phone \_\_\_\_\_

## BROKER INFORMATION

Broker's Name \_\_\_\_\_

Address \_\_\_\_\_

City|State|Zip \_\_\_\_\_

Phone \_\_\_\_\_

## BROKER INSTRUCTIONS

Please gift shares of stock from my account per the following:

Account # \_\_\_\_\_

Fund Name | Symbol \_\_\_\_\_

Quantity of Shares \_\_\_\_\_

## PLEASE TRANSFER THE SHARES TO:

Christ Community Church of St. Charles/South Elgin

Account Number: 2309-6395

Held at: Charles Schwab

DTC#: 0164

Tax ID: 36-3346903

## CONTRIBUTIONS TO BE APPLIED TO:

\_\_\_\_ Aurora Campus

\_\_\_\_ DeKalb Campus

\_\_\_\_ Huntley Campus

\_\_\_\_ St. Charles/South Elgin Campus

\_\_\_\_ Streamwood Campus

\_\_\_\_ Joliet Campus

## CONTRIBUTION TO BE APPLIED TO:

\_\_\_\_ Ministry Fund (# of Shares) \_\_\_\_\_

\_\_\_\_ Places Need Churches Campaign (# of Shares) \_\_\_\_\_

## SIGNATURES & SEAL

Owner's Signature & Date \_\_\_\_\_

Co-Owner's Signature & Date \_\_\_\_\_

## DONOR'S FINAL STEPS: TO ENSURE A SUCCESSFUL FUNDS TRANSFER, PLEASE:

1. Scan and email this form to [finance@ccclife.org](mailto:finance@ccclife.org)
2. Provide this original form to your broker.

**IMPORTANT NOTE TO DONORS:** Due to privacy concerns, your name is not transmitted by the broker to Christ Community Church to identify you as the donor. For Christ Community Church Accounting to identify you as the donor for IRS purposes, we rely solely on you scanning and emailing this form to [finance@ccclife.org](mailto:finance@ccclife.org). It usually takes 5-7 business days for your transfer to be liquidated, settled and posted.

# GIFT OF MUTUAL FUNDS - ELECTRONIC

(This form **CANNOT** be used to transfer Stock)

## DONOR INFORMATION

Owner | Co-Owner \_\_\_\_\_

Address \_\_\_\_\_

City | State | Zip \_\_\_\_\_

Phone \_\_\_\_\_

## BROKER INFORMATION

Broker's Name \_\_\_\_\_

Address \_\_\_\_\_

City|State|Zip \_\_\_\_\_

Phone \_\_\_\_\_

## BROKER INSTRUCTIONS

Please gift shares of stock from my account per the following:

Account # \_\_\_\_\_

Fund Name | Symbol \_\_\_\_\_

Quantity of Shares \_\_\_\_\_

## PLEASE TRANSFER THE SHARES TO:

Christ Community Church of St. Charles/South Elgin

Account Number: 2309-6395

Held at: Charles Schwab

DTC#: 0164

Tax ID: 36-3346903

## CONTRIBUTIONS TO BE APPLIED TO:

\_\_\_\_ Aurora Campus

\_\_\_\_ DeKalb Campus

\_\_\_\_ Huntley Campus

\_\_\_\_ St. Charles/South Elgin Campus

\_\_\_\_ Streamwood Campus

\_\_\_\_ Joliet Campus

## CONTRIBUTION TO BE APPLIED TO:

\_\_\_\_ Ministry Fund (# of Shares) \_\_\_\_\_

\_\_\_\_ Places Need Churches Campaign (# of Shares) \_\_\_\_\_

## SIGNATURES & SEAL

Owner's Signature & Date \_\_\_\_\_

Co-Owner's Signature & Date \_\_\_\_\_

## DONOR'S FINAL STEPS: TO ENSURE A SUCCESSFUL FUNDS TRANSFER, PLEASE:

1. Scan and email this form to [finance@ccclife.org](mailto:finance@ccclife.org)
2. Provide this original form to your broker.

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