

A photograph of a family of three sitting on a light-colored sofa. In the foreground, a woman with long dark hair, wearing a dark red sweater, is looking towards the right. Behind her, a young girl with long dark hair, wearing a white t-shirt, is also looking towards the right. In the background, a man with short dark hair, wearing a light blue t-shirt, is looking down at a tablet computer held in his hands. The scene is lit with soft, natural light from a window on the left, creating a warm and intimate atmosphere.

# 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 worldwide.

## 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)

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

**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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|--|--------|--------------------|-----------------|
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|--|--------|--------------------|-----------------|
|--|--------|--------------------|-----------------|

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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

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**OR DOWNLOAD A DIGITAL PDF AT [BETHANY.ORG/LOI](http://BETHANY.ORG/LOI)**

## 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](https://Bethany.org/GiftPlanning)  
[Bethany.org/LOI](https://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.**