



# Saint Boniface Episcopal Church

## **MAKING A GIFT OF STOCK**

Thank you for your interest in supporting Saint Boniface with a gift of stock. A gift of stock not only benefits Saint Boniface, it may also benefit you, the donor. You may be able to claim a charitable contribution deduction based on the current market value of the donated stock. You may also be able to avoid taxes on your stock's appreciated value. You may apply your gift to the current year or an upcoming year for church finance purposes. However, for IRS purposes your gift will be counted in the year it is given. Please contact your financial advisor or other professional for more information pertinent to your own situation.

For payment with stock, please transfer shares to:

DTC 0141 Wells Fargo Securities  
Client Name: St. Boniface Church  
Account #79786833

Please contact Cindy Hannon, our Business Manager at St. Boniface (941-349-5616, ext 315), to let her know that a transfer is coming – sometimes transfers come in without the giver's name, and this will help us match your gift to your record of giving.

Once we have received your transfer, you will receive a letter of acknowledgment with a list of stock trading values for your tax purposes.