

WHY SECURITIES?

Securities are a ready source for significant gifts without impacting your cash flow. The cash outlay for the securities is in the past, often several years in the past. Over time, the value of the securities have probably increased, possibly significantly. A gift of a securities allows you to give a much larger gift than your actual cash outlay.

STOCK MARKET GOT YOU DOWN?

If your securities have declined since the time you purchased them, you may have a tax benefit in selling the securities. You may be able to use the loss from the sale of the security to offset other capital gains you have incurred.

GO FOR A TWO-FER

If you have a security that has increased significantly, it could be costly to sell the security due to the capital gains tax. Instead of making a cash donation, you can donate the security to Metro Ministries, Inc. and purchase the same security with the cash you planned to donate. This gives you a stepped up basis in the stock, which lowers your capital gain in the future, and provides a capital gain-free donation to Metro Ministries.

In compliance with IRS requirements, we disclose to you that information contained in this brochure is not intended to be used, and may not be used for the purpose of avoiding tax-related penalties. This brochure is intended for education purposes only and is not offered as legal, tax, or other professional advice. Always consult an attorney, accountant, or other professional advisor before making any decision based on data presented herein.



In 1923, Metro Ministries was charged with focusing attention, energies and monies on local mission projects. Metro focused on using funds from closed or abandoned churches in the district for developing new churches and supporting local mission projects. Special grants and requests to aid in building churches and expanding existing programs provided resources within the district.

Today, Metro Ministries uses ministry resources to provide grants in service of Christ in Central Indiana through connecting with community ministries, churches and organizations that are identifying needs, building relationships and creating new, passionate initiatives to serve our neighbors.

Metro connects, resources, supports, and partners with local churches and community outreach ministries who are working with their community, seeing a need, and then developing a program that meets that need.

CONTACT:
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GIFTS OF SECURITIES

Stocks and Bonds



GIFTS OF SECURITIES

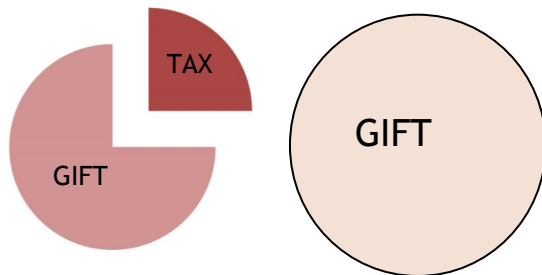
TAX WISE GIVING OF SECURITIES

Current tax regulations allow a charitable deduction of the fair market value of a stock as a contribution to the Foundation. These deductions are limited by your reportable income, so you should consult with your tax advisor. Excess deductions may be carried forward for up to five years.

Gifts of securities also have the advantage of reducing potential capital gains. Over time, stocks usually increase in value and a capital gain is generated when stocks are sold. Capital gains are reportable as taxable income. A gift of a security to the Foundation avoids the sale so no capital gain is generated.

SALE OF STOCK

GIFT OF STOCK



HOW TO GIVE A GIFT OF STOCK WITH A PAPER STOCK CERTIFICATE

If the stock is owned by an individual:

The donor must complete:

- An Irrevocable Stock/Bond Power. You will need one Irrevocable Stock/Bond Power with original signature for each corporate stock being transferred.
- A Security Release Form. On this form, you will list the number of shares, the description (company name), and certificate numbers for the stock that is being submitted for sale. This form needs to be signed in the presence of a notary.
- The owner of the stock must send the Foundation a Stock Gift Instruction form with original signature to the Foundation before the proceeds from the stock can be distributed.

If the stock is owned by a Revocable Living Trust:

The trustee for the trust will complete and sign the paperwork.

HOW TO GIVE A GIFT OF STOCK BY ELECTRONIC TRANSFER

Electronic transfers are facilitated through your broker:

- The owner of the stock must send the Foundation a Stock Gift Instruction form with original signature prior to the origination of the transfer.
- The Foundation will provide information on the receiving agent, DTC number and account number for the transfer.
- It is the policy of the Foundation to liquidate all stock transfers immediately. As the Foundation has a diversified investment portfolio, the proceeds from any stocks will be reinvested in the standard investment policy of the Foundation.

Our Foundation Investment Officer is available to assist you with your transfer.

