

## GIVE STOCK, SAVE TAXES, GIVE MORE

## Maximize Kingdom impact by giving appreciated securities instead of writing checks

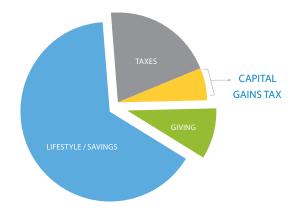
If you are currently writing checks to FCA, but also have appreciated stocks or mutual funds in a taxable investment portfolio, you likely have a significant opportunity to pay less tax, give more, improve your personal cash flow, and simplify your giving.

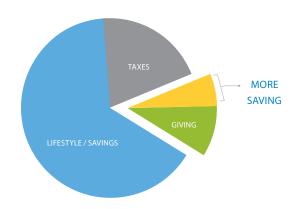
#### TRADITIONAL GIVING USING CHECKS

- 1. Start with \$10,000 in cash
- 2. Write checks to FCA for \$10,000
- 3. Receive a \$10,000 charitable deduction
- 4. Keep track of every tax receipt manually
- 5. Continue to pay capital gains tax in your portfolio (now or later)

# MORE GIVING USING STOCK

- 1. Donate \$10,000 of stock into your NCF Giving Fund
- 2. Receive a \$10,000 charitable deduction
- 3. Shares are sold by NCF tax-free, with proceeds placed in your NCF Giving Fund
- 4. Re-fund your portfolio using \$10,000 cash (reset basis!)
- 5. Use tax savings to give more!





#### IMPACT OF A NEW APPROACH

#### Multiply Your Impact

- Less tax You eliminate capital gain tax on the donated stock (\$1,250 saved assuming \$5k cost basis with 25% tax)
- More giving You increase your giving capacity by eliminating current or future tax exposure
- Reset your cost basis Still like the stock? Use your cash to repurchase the same stock or mutual fund
- Tax-free rebalancing Your investment advisor can rebalance your portfolio with no tax consequences
- Improved personal cash flow Using tax savings to give more increases your charitable deduction
- Tax-free growth Gifts invested inside your NCF Giving Fund can grow tax-free

### **Simplify Your Giving**

- Deduct now, grant later Receive a deduction this year while granting over time, if desired
- Leverage your time One stock gift can be easily used to support multiple ministries
- Eliminate the hassle Consolidate tax receipting under one charity (NCF) and manage all your giving online



# How to Give Stock to FCA

Please complete this form in 3 simple steps:

- 1. Fill out form below with your information.
- 2. Email or fax one copy to your broker.
- 3. Email or fax one copy to Clay Meyer to ensure your gift is properly designated.

## **Your Information:**

Name:
Address:
Phone Number(s):
Stock Information:
Stock Name:
Stock Symbol:
Number of Shares: Transfer Gift Date:
Broker's Name:
Firm:
Phone Number(s):
Email:
Your Gift Designation:
□ FCA Area:
□ FCA Staff Person:
Signature:

#### **FCA Broker Information**

Charles Schwab and Company 11004 Metcalf Avenue Overland Park, KS 66210 Schwab Asset Transfer Division 1-800-435-4000

Account Name: Fellowship of

**Christian Athletes** 

DTC: 0164

Account: 32459918

# Fellowship of Christian Athletes

8701 Leeds Road Kansas City, MO 64129-1680 EIN: 44-0610626

## FCA Stock Contact

Clay Meyer 800-289-0909 816-892-1191 Fax: 816-923-2136 cmeyer@fca.org

When you choose to give a gift of stock to FCA, you:

- Enjoy a charitable tax deduction.
- Avoid capital gains tax.
- Support FCA in ministry.