YOUR GIFT PLANNING JOURNEY



GIFTING STOCK, SECURITIES, OR MUTUAL FUNDS

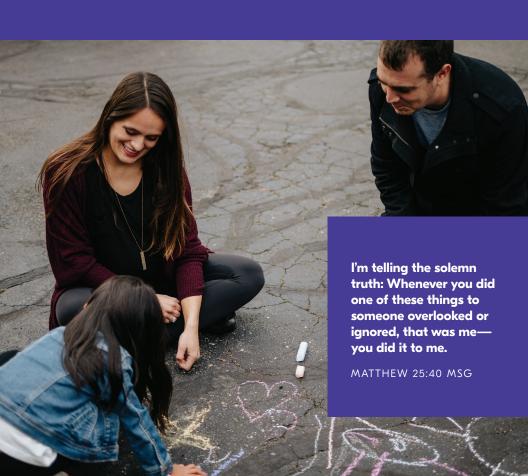
Transform lives for years to come

PART 1

Gifting 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.



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 RECIEPT

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 NAME	MY EMAIL ADDRESS	MY PHONE #
The broker who will be o Christian Charitable Fou	delivering the securities to Na andation, Inc is:	ational
NAME OF BROKER	BROKER PHONE #	MY ACCOUNT # AT BROKERAGE
	eliver the shares to one of the undation, Inc brokerage acco	2
via DTC #0226	National Financial Services	(Fidelity) Account #479-048720
journaled to Me	errill Lynch Acct# 210-04116 (DTC 8862)
journaled to TD	Ameritrade Acct# 90169482	20 (DTC 0188)
journaled to Sc l	hwab and Co Acct# 6595-87	708 (DTC 0164)
	ecurities will be transferred to	
When the securities arri accounts, please move t	ve at one of the above broke he proceeds to:	erage
Bethany Christian Serv	ices Single Charity Fund # 1	327718
The receipt should be m	ade out to (individuals/entiti	ies/trusts):
NAME SHARES ARE REGIS	STERED IN	
STREET ADDRESS		
CITY STATE 7IP	,	

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 asse	ts:			
Cash Contributions \$ Stocks, mutual funds, or other publicly	traded as	ssets listed	below	
DESCRIPTION OF ASSETS/NAME OF SECURITY	SYMBOL	EXACT # C	DF SHARES*	APPROX \$ VALUE
DESCRIPTION OF ASSETS/NAME OF SECURITY	SYMBOL	EXACT # C	DF SHARES*	APPROX \$ VALUE
DESCRIPTION OF ASSETS/NAME OF SECURITY	SYMBOL	EXACT # C	DF SHARES*	APPROX \$ VALUE
DESCRIPTION OF ASSETS/NAME OF SECURITY	SYMBOL	EXACT # C	DF SHARES*	APPROX \$ VALUE
*Please initiate the transfer based on the number values may fluctuate. Shares are to be transferre				•
SIGNATURES				
GIVER I: 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

GIVE THE GIFT OF HOPE

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 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.