

THE **G.I.F.T.** SERIES

GENERATING IMPACT FROM TREASURE



**GIFTING STOCK, SECURITIES,
OR MUTUAL FUNDS**

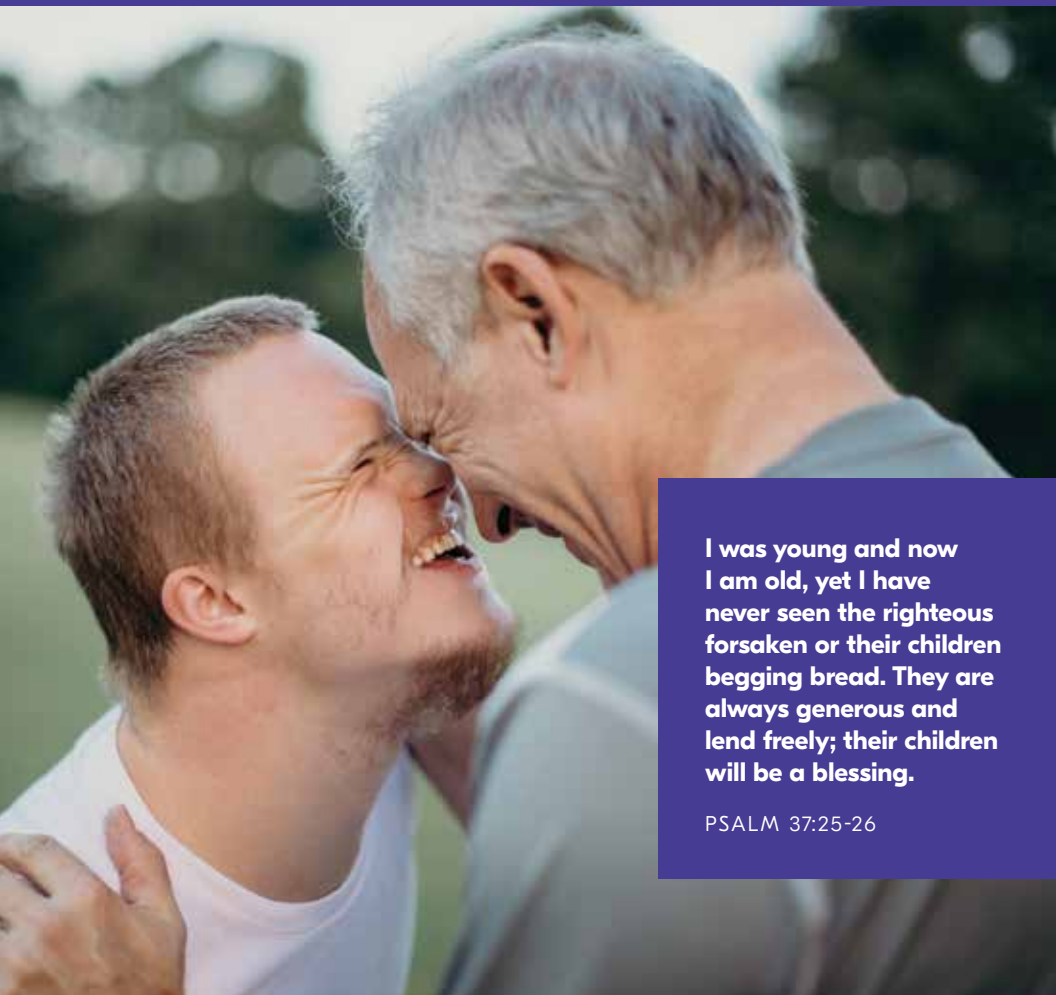
Transform lives for years to come

PART 3

Letter of authorization

To initiate the process of electronically transferring stocks, securities, or mutual funds to Bethany, your broker must complete the Letter of Authorization and send it:

**Atten: Bruce Hakim,
Director of Legacy Gifts**



I was young and now
I am old, yet I have
never seen the righteous
forsaken or their children
begging bread. They are
always generous and
lend freely; their children
will be a blessing.

PSALM 37:25-26

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 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.*



FOR MORE INFORMATION AND ADDITIONAL RESOURCES VISIT
[Bethany.org/Legacy](https://bethany.org/legacy)

FOR A REFERRAL TO FINANCIAL, TAX, OR LEGAL PROFESSIONALS CONTACT
Bruce T. Hakim, Director of Legacy Gifts
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This information is not intended as financial or legal advice. Always consult with a professionally licensed tax advisor or estate attorney before making decisions.