

## Gifts of Stock, Securities or Other Appreciated Assets to Reliant Mission

Thank you for your interest in supporting the ministry of Reliant Mission by considering a gift of stock, securities, or other appreciated assets.

Because Reliant is a qualified 501(c)(3) non-profit organization, charitable contributions to Reliant are tax deductible as permitted by law.

When considering a gift of stock, securities or other appreciated assets (e.g., real estate) to Reliant, there can be two significant tax benefits to you as the donor.

- First, to the extent you have any capital gains resulting from the appreciation of the asset you donate, *you will not be required to pay any capital gains tax on that appreciation*. For example, if you paid \$10,000 for 100 shares of stock and donate that stock to Reliant when its fair market value is \$25,000, you will not pay any tax on the \$15,000 gain in the value of the stock.
- Second, if you have held the property for more than one year (resulting in long-term capital gains), you are also entitled to *an income tax deduction for the fair market value of the property* as of the date you donate that property to Reliant. Using the above example, you would be eligible to deduct \$25,000 from your current year income, up to a fixed percentage (generally 30 percent for capital assets) of your adjusted gross income. You may also carry over any unused portion of that deduction for up to five subsequent tax years. (For stock that has been held one year or less, your deduction is limited to the fair market value less the amount the stock has appreciated since you acquired it – typically your basis in the property.)

Because unique circumstances may apply to your situation, we recommend that you consult your tax advisor in determining the deductibility of a gift of appreciated assets to Reliant.\* You may also wish to consult IRS Publication 526, Charitable Contributions, for more information.

If you have any questions about giving to Reliant, please feel free to contact me, or our donor services department at 877-614-4600.

Thank you for generously supporting the work of Reliant Mission.

This communication is not intended to be legal or tax advice by Reliant and is not intended to apply to any specific tax situation. Please consult your tax advisor.

**Judi Major**

**Donor Liaison**

**Reliant Mission, Inc.**

877-614-4600 | [www.reliant.org](http://www.reliant.org)

11002 Lake Hart Dr Ste 100, Orlando, FL 32832

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### Stock Gifts to Reliant Mission, Inc.

Thank you for your recent inquiry concerning a gift of stock or other securities to Reliant Mission. This letter provides the necessary information concerning how to make such a gift.

Please send a letter of intent to your brokerage firm stating that you wish to transfer stock (or other securities, if applicable) from your brokerage account to Reliant's Charles Schwab account as a charitable donation. The letter should include the following information:

- Your name and brokerage account number.
- The full name and exact number of shares of each security you wish to transfer.
- Reliant's name and Charles Schwab account number.
- The Depository Trust Corp. (DTC) number for the transfer.
- The name of the Reliant ministry you prefer to support.
  - ***Please indicate Ross & Susan's Reliant Fund Number: FD7114 to note your preference in supporting our work, not just the general Reliant fund.***
- Please be sure to sign and date your letter (both spouses must sign if joint account).

Please forward one copy of your letter of intent to Judi Major, Reliant's Stock Donor Representative. Upon receiving your letter of intent and gift, Reliant will send you a receipt for your contribution.

Reliant's Charles Schwab Account Name: Reliant Mission, Inc.

Reliant's Charles Schwab Account Number: ***Call Ross at 919-539-4259 for details.***

Reliant's Federal Tax ID Number: ***Call Ross at 919-539-4259 for details.***

Reliant's D.T.C. Number: ***Call Ross at 919-539-4259 for details.***

**Ross & Susan Thomas' Reliant Fund Number: FD7114**

If you have any questions about this process, please feel free to contact Tatiana Cortes or myself. Thank you again for generously supporting the work of Reliant.

[judi.major@reliant.org](mailto:judi.major@reliant.org) 877-614-4600

### **Judi Major**

**Donor Liaison**

**Reliant Mission, Inc.**

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