



# GIFT OF STOCK

## *Live Oaks Community Church*

Thank you for your interest in making a charitable gift to **Live Oaks Community Church** in the form of a Stock Transfer. **Please complete and return the second page of this form to receive your tax acknowledgement.**

For Stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to **Live Oaks Community Church**. Giving a gift of publicly traded stock that has increased in value and the you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to **Live Oaks Community Church** (tax ID #80-0764435), please note the following:

- ❖ Brokerage House: Fidelity Investments
- ❖ Account Name: **Live Oaks Community Church**
- ❖ Account Number: **Z73-266426**
- ❖ Location: 1057 Lake Sumter Landing, The Villages, FL 32162
- ❖ Branch Phone: 352-205-8836
- ❖ DTC number: 0226
- ❖ Reference: Donor Name (Including your name will ensure the gift is properly acknowledged)



# GIFT OF STOCK FORM

## Live Oaks Community Church

Please complete the information below to notify **Live Oaks Community Church** of your gift and help ensure it is processed accurately. Please email to [victoria@liveoakschurch.org](mailto:victoria@liveoakschurch.org) for **Live Oaks Community Church**, or mail to Administrator, Live Oaks Community Church, 11962 CR 101, Suite 302, The Villages, FL 32162.

### Donor & Securities Information (Please Print):

Name & Type of Securities (e.g.: DELL common stock)	Security Symbol	Number of Shares	Transfer Date

Donor Name (Individual, Corporation, Foundation)

Donor Street Address

Donor City/State/Zip

Your Broker Name

Your Broker Company/City/State

Your Broker Contact/Telephone Number

Donor Telephone / Email Address (to be used only if a question arises in the donation process)

Donor Signature

Date Signed

Donor Signature

Date Signed

**Please use this gift for:** \_\_\_\_\_

*(General Fund, Living Oaks Campaign, Operation Christmas Child, etc.)*

**NOTE:** All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

**Thanks again for considering Live Oaks Community Church as the recipient of your charitable gift!**