

# Crosspoint Church

## Stock Donation Instructions

Gifts of stocks and bonds that have appreciated in value can be one of the most advantageous ways of giving. You may deduct the full fair market value of the stock as a charitable contribution, while bypassing all capital gains taxes assuming that you have held the stock for more than one year. Donating securities would not however be appropriate if you hold securities that have declined in value. You should consider selling the securities and donate the cash proceeds. In this way, you establish a tax loss and claim an income tax charitable donation for the cash gift.

The value of your gift is calculated by using an average of the high and low prices of the security on the date that it enters our account. This is included in our thank you letter which can then be used as proof of your donation for tax purposes and will also be included in your annual giving statement.

Crosspoint Church has established a brokerage account at Charles Schwab & Co., Inc. Please follow the directions below to complete your donation.

### **Stock Donations: Electronic Transfer of Stock held in a brokerage account**

Step 1: Notify your broker or financial consultant to authorize the transfer by faxing or mailing the attached Securities Gift Form.

Step 2: For acknowledgement purposes, Crosspoint Church must receive a copy of the Securities Gift Form. Please send it to:

Acropolis Investment Management  
ATTN: Dannelle Ward  
14755 North Outer Forty, Suite 100  
Chesterfield, MO 63017  
Telephone: 636-449-4900  
Fax: 888-453-1266  
Email: dw@acrinv.com

### **Stock Donations: Physical paper certificates**

Step 1: Complete the attached Securities Gift form

Step 2: Provide the completed form to Dannelle Ward of Acropolis Investment Management by fax, e-mail or mail.

Step 3: Dannelle will contact you and provide you with additional forms including prepaid UPS shipping documents to deliver the shares to Crosspoint Church's account at Charles Schwab & Co., Inc.

# Crosspoint Church Securities Gift Form

## Donor Contact Information

*First Name	Middle	*Last Name	Date
*Street 1		*Day Phone	Evening Phone
Street 2		Email address	
*City	*State	*Zip Code	*Brokerage Account Number

## Asset Information

*Symbol	Asset Name	*Number of Shares	Approximate dollar amount

Gift Held At:

- The gift is held in an account at a **brokerage firm**.
- The gift is held in the form of a stock or bond **physical certificate**.

## Gift Information

Purpose of Gift <input type="checkbox"/> Outlive your Life Campaign <input type="checkbox"/> Tithes <input type="checkbox"/> Missions <input type="checkbox"/> Other
--

## Broker Instruction

Please deliver the above shares to Crosspoint Church as follows: DTC: 0164 Charles Schwab & Co., Inc. Account Name: Crosspoint Church Account Number: 1346-2639
---

## Donor Signature

Client Signature
Client Name

*\*Required fields.*