

THE BENEFITS AND PROCESS OF GIVING MARKETABLE SECURITIES

THECOMPASSCHURCH

THE BENEFITS

You will receive a tax deduction for the fair market value of your securities at the time of donation, and you will pay no capital gains tax on the difference between your cost and the fair market value.

THE PROCESS

1. Read these instructions.
2. Fill out the appropriate form on the following pages.
3. Send a copy of the appropriate form to your broker to authorize the transfer.
4. Send an electronic copy/scan to The Compass Church – Attention: Finance Department to finance@thecompass.net, or mail it to The Compass Church, Attention: Finance Department, 2244 W. 95th Street, Suite 300, Naperville, IL 60564, letting us know how you want the funds applied.

GIFT OF STOCK - ELECTRONIC

This form CANNOT be used to transfer Mutual Funds

DONOR INFORMATION

Owner | Co-Owner _____

Address _____

City | State | Zip _____

Phone _____

BROKER INFORMATION

Broker's Name _____

Address _____

City | State | Zip _____

Phone _____

BROKER INSTRUCTIONS PLEASE GIFT SHARES OF STOCK FROM MY ACCOUNT PER THE FOLLOWING:

Account # _____

Fund Name | Symbol _____

Quantity of Shares _____

PLEASE TRANSFER THE SHARES TO:

The Compass Evangelical Free Church (DBA The Compass Church)

Account Number: 50719230

Held at: Schwab

Schwab Address: 1945 Northwestern Dr., El Paso, TX 79912, Schwab Fax: 877-242-2679

DTC#: 0164, Tax ID: 36-3256985

SIGNATURES

Owner's Signature & Date _____

Co-Owner's Signature & Date _____

DONOR'S FINAL STEPS: TO ENSURE A SUCCESSFUL FUNDS TRANSFER, PLEASE:

1. Scan and email this form to finance@thecompass.net, or mail to The Compass Church, Attention: Finance Department, 2244 W. 95th Street, Suite 300, Naperville, IL 60564
2. Provide this original form to your broker

IMPORTANT NOTE TO DONORS: Due to privacy concerns, your name is not transmitted by the broker to The Compass Church to identify you as the donor. For The Compass Church Accounting to identify you as the donor for IRS purposes, we rely solely on you scanning and emailing this form to finance@thecompass.net. It usually takes 3-5 business days for your transfer to be liquidated, settled and posted.

GIFT OF MUTUAL FUNDS - ELECTRONIC

This form CANNOT be used to transfer Stock

DONOR INFORMATION

Owner | Co-Owner _____

Address _____

City | State | Zip _____

Phone _____

BROKER INFORMATION

Broker's Name _____

Address _____

City | State | Zip _____

Phone _____

BROKER INSTRUCTIONS PLEASE GIFT SHARES OF MUTUAL FUNDS FROM MY ACCOUNT PER THE FOLLOWING:

Account # _____

Fund Name | Symbol _____

Quantity of Shares _____

PLEASE TRANSFER THE SHARES TO:

The Compass Evangelical Free Church (DBA The Compass Church)

Account Number: 50719230

Held at: Schwab

Schwab Address: 1945 Northwestern Dr., El Paso, TX 79912, Schwab Fax: 877-242-2679

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