

Donating Stock to St. Bartholomew's Church

Securities Donation Account

Donating appreciated securities can be a great way to fulfill your charitable intent. You may fulfill your pledge, donate to the Endowment, make an unrestricted gift or help Project Jigsaw. Not only will you receive a tax donation for the value of the securities, but you will avoid paying any capital gains on the appreciation. This can be a very effective financial planning tool and you are encouraged to discuss with your financial advisor or tax planner to understand how this will work for your specific situation.

Forms of securities accepted generally include stocks, bonds, physical certificates, and both exchange-traded funds and mutual funds.

To make a gift, please contact your current advisor and provide them with the following information for St. Bartholomew's receiving account:

Name of Account: St. Bartholomew's Church
LPL Financial DTC # 0075
Account #7033-5252

You or your advisor can contact the church's financial advisor, Chris Shematek, at 410.309.4200 or chris.shematek@lpl.com to provide further information on the gift.

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