



Giving with Purpose:

A Thoughtful Blending of Your Legacy and Your Faith

Accomplish Your Purpose With a Gift of Stock or Mutual Funds

Your Goal

You want to provide an **immediate donation** to Purpose Church while **minimizing capital gains taxes**. In addition, you want to receive the **maximum charitable tax deduction allowable** for your donation.

A gift of Stock or Mutual Funds can help you achieve your goals

Donating appreciated stock or mutual funds directly to the Church offers several benefits to you while furthering the ministry.

- Regardless of your cost basis, you may deduct the present market value of the asset (up to 30% of your adjusted gross income) on your income tax return.
- By donating the asset (rather than selling it and donating the proceeds), you eliminate payment of capital gains taxes. (However, if the asset has depreciated in value, you will want to sell it, donate the proceeds, and claim the capital gains loss.)
- Your gift will be invested by the Board of Trustees in the ministry of Purpose Church or to a specific project you designate.
- Your gift will be a testimony of your commitment to Christ and His Church for years to come.

How to donate Stock or Mutual Funds

Please work directly with your stock broker or mutual fund manager to arrange to donate stock or a mutual fund to First Baptist Church of Pomona (dba Purpose Church). He or she can help you determine if the asset has appreciated or depreciated in value so you can choose whether to donate the asset directly or sell it and donate the proceeds.

How to complete this gift

To make your gift, please instruct your stock broker or fund manager to initiate the transfer of ownership to First Baptist Church of Pomona. To transfer the ownership of the asset electronically, please provide your broker/manager with the following information:

Church Broker: Securities America, Inc.

Pershing Clearing Number 0443

Account Name: First Baptist Church of Pomona
(Tax ID #95-1731714)

Account Number: 73U-820674

If you have paper stock certificates and prefer to mail them directly, please use registered mail and mail the UNENDORSED certificate(s) and a Stock Power Form, plus a Stock Waiver Form *in a separate envelope*, to:

Purpose Church

ATTN: COO

586 N. Main Street

Pomona, CA 91768

PURPOSE CHURCH



586 N. Main Street, Pomona, CA 91768 | 909.629.5277 | PurposeChurch.com

First Baptist Church of Pomona, doing business as Purpose Church, has been faithful to God's calling and has impacted tens of thousands of lives in the name of Jesus Christ since we were founded in 1870. Our mission is "Helping people find their purpose to connect with God, connect with others, connect others with God," and our vision is **Everyone, Everywhere, Following Jesus**.

The above information is not intended as legal or financial advice; please consult with your financial advisor and/or tax attorney on the best way to prepare an estate plan or legacy gift strategy for yourself and your family. First Baptist Church of Pomona is a 501(c)(3) nonprofit organization; our Federal Tax I.D. number is 95-1731714.