

## **GIFTING/DONATING APPRECIATED STOCK TO UUCC**

Revised March 2018

Your donated stock to UUCC may be directed to any of the funds you choose (e.g. to the operating fund, to the building fund, or to the endowment fund). Gifting shares which qualify as long-term capital gains have significant tax benefits to the donor. To qualify, the donor must transfer the shares to UUCC. (Do not cash shares as this constitutes a taxable event!) The donor then can claim the full dollar amount of the gift on the date of the transfer as an itemized deduction (IRS Form 1040 Schedule A). The donor owes no capital gains tax on the appreciated asset, a very nice double benefit.

**IMPORTANT:** Please contact the UUCC office at 410-381-0097 or [officeasst@uucolumbia.net](mailto:officeasst@uucolumbia.net) to let us know the transaction is underway. Let us know how many shares, the name of the stock, and how you want UUCC to credit the gift amount (whether to pledge or to other fund).

**Please instruct** your broker to deliver shares to:

TD Ameritrade  
DTC 0188  
FBO Unitarian Universalist Congregation Of Columbia  
Account# 427802905

**And please remember to let UUCC know it's coming!**

Thank you for your generosity.