

GIFTS THAT REDUCE TAXES

Stock, Real Estate and Other Non-Cash Assets



Christian
Reformed
Church

You may be able to increase your potential impact—and experience significant tax savings—by giving stock, real estate or other non-cash assets to ministry.



Most Americans carry only 10 percent of their wealth in the form of cash. The remaining 90 percent is held in the form of non-cash assets, such as stock, real estate, business interests or commodities.

By considering all the resources God has entrusted you to manage, you can multiply the impact of your generosity AND eliminate unwanted costs and stress.



Benefits of Giving Non-Cash Assets

- **Tax-wise.** Receive a fair market value deduction at the time of your gift and avoid tax liability on the sale of appreciated assets.
- **Eliminate hassles.** Give assets you no longer need or want to manage (such as rental properties or vacation homes) for the benefit of your church.
- **Capacity to give.** Give from your excess resources without restricting cash flow.
- **Estate planning.** Eliminate potential taxes or complications for your heirs by giving complex or burdensome assets to ministry now.



Give more by giving smarter. Donating non-cash assets can be a great tax-wise alternative to donating cash.

Examples of Non-Cash Assets



Appreciated
stock or
marketable
securities

Real estate



Business
interests

Farm
commodities
and machinery



Stewards Fund *Streamlined and Simplified Giving*

The CRCNA partners with Barnabas Foundation to simplify and streamline your giving of stock, real estate and other non-cash assets.

Barnabas Foundation will accept, manage and liquidate your assets. You can then specify if you would like Barnabas Foundation to send a check directly to your church, or if you would rather open a Stewards Fund (donor-advised fund) account through which you can give to your church and other favorite ministries.



LEARN MORE

To learn more about gifts of non-cash assets or other smart and powerful giving options, call Barnabas Foundation at 888.448.3040 or email info@BarnabasFoundation.com.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your financial advisor and legal counsel for information and advice specific to your situation.



Toll-Free: 888.448.3040
www.BarnabasFoundation.com
3801 Eagle Nest Drive, Suite B • Crete, IL 60417-1933

GIFTING SECURITIES FOR THE BENEFIT OF YOUR CHURCH

Use this form and instructions below to contribute publically traded securities to Barnabas Foundation and have the proceeds from the sale forwarded to your church.

Step 1: Contact your financial advisor/broker about your intent to electronically transfer securities to Barnabas Foundation. Typically your advisor will have a form for you to complete or request a letter of instruction requiring the following information about Barnabas Foundation's brokerage account:

Name of Receiving Firm: E*Trade Securities, LLC
DTC: 0385
Account Number: 5550-3250
Receiving Acct Name: Barnabas Foundation, EIN #36-2904503
(NOTE: do not include the name of the church, only list Barnabas Foundation)
E*Trade Contact: platinum4@etrade.com or 1.800.503.9260

Step 2: Notify Barnabas Foundation of your gift by returning this document by e-mail to gifts@BarnabasFoundation.com or call 888.448.3040, ext. 4 to provide information.

Contributor's Name: _____

Contributor's Address: _____

Name of Church to receive proceeds from sale: _____

Church Address: _____

Name of Security and/or Symbol* _____ **Number of shares** _____

Name of Security and/or Symbol _____ **Number of shares** _____

Name of Security and/or Symbol _____ **Number of shares** _____

Other information: _____

**If gifting more than 3 securities, please include an additional form.*

If we do not receive notification of a gift, the shares will be liquidated and placed in a holding account until claimed. Unclaimed gifts are transferred to the Barnabas Foundation Operating Fund.

Step 3: Confirm your transfer - Transfers must be initiated by your financial advisor/broker. Please confirm with them that the shares have been transferred from your account to Barnabas Foundation's account.

Barnabas Foundation will provide you a charitable receipt for your contribution including its value for IRS reporting purposes. The church will also receive a copy of the letter. The gift amount for charitable donation purposes will be the average of the high and low share price on the day the share is received.

If your security is held directly at a transfer agent, proprietary mutual fund firm, or in physical certificate form, contact Barnabas Foundation for details on how to transfer your shares.

If you have any questions regarding the gifting of securities, please do not hesitate to contact us at gifts@BarnabasFoundation.com or 888.448.3040, extension 4. We are happy to assist you!