



# Donating Stock or Securities

Thank you for your interest in supporting LSS and our Network of Hope. A gift of appreciated securities, such as stocks, bonds or mutual funds, can be a wonderful alternative to making cash contributions and offers some tax advantages. Contributing appreciated securities that have been owned for more than one year provides the opportunity to make an impactful gift to LSS while avoiding capital gains tax. You will receive a charitable deduction for the full fair market value of the stock, bond or mutual fund. This value is calculated utilizing the mean between the highest and lowest quoted selling price on the date the security is delivered.

## Stock Gifts

To facilitate a gift of stock, please follow these simple steps:

### #1 INITIATE THE STOCK TRANSFER

Securities can be gifted to LSS in two ways: through electronic transfer (in which your broker transfers shares using our LSS DTC number) or by physically mailing the paper certificates to LSS. With either method, you must first contact your broker to initiate the transfer. For your convenience, we can provide a sample letter for you to update and send to your broker—simply call or e-mail Mary Costlow at the information below to request this.

### #2 SEND THE SECURITIES

If sending electronically, have your broker transfer the donation to LSS through:

#### Fidelity

**DTC #: 0226**

**Account Name: Lutheran Social Services Fund**

**Account Number: 657-663251**

If sending paper stock certificates:

*\*Complete a Stock Power Form for each stock certificate and sign with a Medallion Signature Guarantee, which can be obtained through your brokerage firm or a bank. Please contact us if you need a Stock Power Form.*

*\*Deliver these documents to Lutheran Social Services at the address below. If you choose to mail these documents, you should send the Stock Power Forms and the paper stock certificates separately for purposes of security and deliver by registered mail to:*

**Lutheran Social Services**

**Attn: Mary Costlow**

**500 West Wilson Bridge Rd, Suite 245**

**Worthington, Ohio 43085**

### #3 NOTIFY LSS THAT YOU ARE DONATING SECURITIES

However you deliver your gift of securities, there is information we need from you in order to acknowledge your gift.

Please call or email e-mail Mary Costlow at the information below and include:

- your name
- the name of the securities
- the number of shares
- the date of transfer

We will also want to know how to attribute your gift—either to our LSS Network of Hope, LSS Faith Mission, LSS Food Pantries, LSS CHOICES for Victims of Domestic Violence or LSS Faith Mission of Fairfield County. You can designate your gift to one or multiple service areas.

## Mutual Funds

Please contact Mary Costlow at the information below directly if you are interested in donating mutual funds. Mutual funds do not transfer the same as stock and we will work with you personally to assist in the process.

### Contact

**Mary Costlow**

mcostlow@lssnetworkofhope.org

614-429-5484