



Year-End Planning... Pledging with Profits!

Capital gains taxes can be substantial when stocks that have appreciated over the years are sold. To maximize this asset, consider gifting your appreciated stock rather than cash. Benefits from gifting stock include:

Reduce taxation by gifting directly to a charity. Gifting highly appreciated shares and using cash to buy new shares in today's market, can reducing capital gains tax in the future.

Large blocks of stock create additional options. A life income arrangement allows for a block of stock to be sold and re-invested in a diversified portfolio without capital gains tax. Income paid out over your lifetime(s) precedes a final distribution to your church or other United Methodist agency in the future.

Foundation staff can facilitate stock sales for you. Stock transfers can take time, a missed signature or wrong account number can take days to catch and correct. To make sure you receive a tax-deduction this year, please make stock transfers no later than December 15th.

For assistance gifting stock, please call us!

UNITED METHODIST FOUNDATION OF NEW ENGLAND



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