

Gifts of Securities



Consider a tax-saving gift of securities to the United Christian Academy Foundation

Giving long-term appreciated stock or mutual fund shares offers three-fold tax savings:

1. You avoid paying capital gains tax on the increase in value of your stock.
2. You receive an income tax deduction for the full fair-market value of the stock on the date of the gift (regardless of what United Christian Academy Foundation nets when it sells the stock).
3. You may deduct up to 30 percent of your adjusted gross income with an additional five-year carry forward. The carry forward provision allows you to use the deduction in future years, potentially spreading your deduction over six years.

Other benefits of making gifts or pledge payments with appreciated securities:

1. Such a gift may not impact your income stream as much as a gift of cash.
2. Using securities may allow you to maximize the gift you wish to make.
3. The gift process (electronic transfer in most cases) can be handled easily by your broker and the United Christian Academy Foundation Office.

An example:

If you bought stock many years ago for \$1,000 and it is now worth \$10,000, an outright gift of that stock to United Christian Academy Foundation would result in a charitable deduction of \$10,000. In addition, you would permanently avoid capital gains taxes on the \$9,000 of appreciation.

Important:

Before transferring your gift, please contact: Evan Dalrymple United Christian Academy, Executive Director at and provide the following information:

1. Your name
2. Broker's name (individual and company) and telephone number
3. Description of security issue and number of shares
4. Gift designation (if any) (Capital Campaign, specific memorial fund, etc.)

It is important that you contact the Campaign Office before donating securities so that we can properly credit your gift.

Electronic Transfer of Securities:

To transfer stock electronically, please give your broker or custodian the following information:

Gifts of DTC eligible securities:

Deliver to DTC Clearing #:

The Depository Trust Company

Participant Account: 2803

For Credit to Account Number: #080023677400

Name: United Christian Academy Foundation

United Christian Academy Foundation EIN 88-1016660

(All deliveries must include client name and FCC account number)

United Christian Academy Foundation
brokerage account information

Contact:

Advisors: Ascent Private Capital Management
of U.S. Bank
800 Nicollet Mall, Floor 24
Minneapolis, MN 55402
Customer Service Line: 800.285.7800

Please ask your stockbroker or custodian to provide the donor's name at the time of the transfer. Thank you for your generosity. We will contact you as soon as we receive the transfer.

For more information about a stock gift, please contact: Evan Dalrymple

Head of School/Executive Director

Light the Way Campaign

United Christian Academy Foundation

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