

Ardmore United Methodist Church
200 Argyle Rd, Ardmore, PA 19003
Office - 610-649-4382
aumeth@verizon.net / www.ardmorechurch.com
Rev. Timothy Thomson-Hohl, Pastor
610.306.3709 (cell) - thomhaht@aol.com
Rev. Donald R. Williams, Pastor Emeritus

ENHANCED BENEFITS OF DONATING APPRECIATED STOCK AND PROPERTY

This represents a "gift" to the owner of the asset as well as to the charitable organization. The donor is able to deduct the entire appreciated amount of the donation as a tax deduction and does not have to pay income tax on the difference between the cost of the asset and its current worth. In the vast majority of cases the asset is a marketable security such as stocks, bonds or mutual funds.

In order to take advantage of this tax deduction:

- The donor must have owned the asset for at least one year.
- The donor does not sell the security prior to making the donation. It should be donated "in kind" to the qualified charity and then liquidated by the charity.

Ardmore United Methodist Church would be pleased to accept such gifts. Please inform us of your intent and we will help arrange the transfer of the assets which would be coordinated by our representatives at The Vanguard Group.

There are some limits on the deductibility of gifts involving appreciated property. The limit is 30% of your adjusted gross income. However, amounts you are unable to deduct in the current year may be carried forward and used in future years.

This strategy can also be used to donate other types of property such as real estate; however, you should consult with your tax advisor as well as the qualified charity for additional details.

If you wish to honor The United Methodist Church with such a pledge, please complete the attached "**Planned Giving**" intent form and submit it to the church office.

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ARDMORE UNITED METHODIST CHURCH PLANNED GIVING INTENT FORM

Date: _____

Name of Donor(s): _____

Address: _____

Phone number: _____

Dear members of the Church Finance Committee,

Please be advised that it is my/our intention to donate the following asset to The Ardmore United Methodist Church:

At this time the asset is being held in my account at _____

It is my/our wish that the funds received by the church be directed toward the following mission(s):

I further understand that this represents a pledge which does not legally bind me to fulfill such an obligation.