

Welcome All. Love All.



Serve All.

## INFORMATION FOR GIFTS OF STOCK

Apex UMC uses Truist Investments to receive stock donations. Below is the information that you will need to transfer stock into our account. **Please notify the finance department at the email below when you initiate the transfer so we can accurately post your gift as you intend.**

We will send you a letter acknowledging the donation, including the number of shares and the date it was received into our account for your tax records. The tax-deductible amount of your gift may vary from the actual amount of cash received by the church when the stock was sold. The deductible amount is the average of the high and low value of the stock on the day it was contributed to Apex United Methodist Church. We recommend that you confer with your accountant or tax advisor in determining the actual tax-deductible value.

We will sell the stock and post it to your contributions as a non-cash gift, but still apply the funds received to any pledge that you may have, if desired.

### **Investment Firm:**

Truist / National Financial Services

800-453-7348

Acct. WA8064442

DTC# 0226

Apex United Methodist Church Tax ID 56-1158859

### **Apex UMC contact:**

John Garrison, Church Treasurer

Mary Beth Parker, Financial Secretary

[finance@apexumc.org](mailto:finance@apexumc.org)

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