

**APPRECIATED SECURITIES MAKE A GREAT GIFT TO YOUR CHURCH  
DRAFT**

Many of our members have found that giving appreciated stock, bonds, or other securities to the church makes very good sense. Please ask your financial advisor if this is a viable option for you and consult your tax advisor or legal advisor for more information on possible tax benefits.

We need your help when you give securities to the church. *First and foremost*, please notify Lisa Heathcote, parish administrator, personally (by phone, letter, or email) before you plan to transfer stock to the church. Do not rely on your broker to do so. Failure to notify the church office could mean that stocks are not sold in a timely manner, or that proceeds were not credited to the correct donor. Emmanuel Lutheran Church's Finance Committee policy is that all gifted securities will be sold immediately and the proceeds promptly deposited into the church bank account. Also note that Emmanuel Lutheran Church, at the discretion of the Pastor and/or President of the Congregation, reserves the right to refuse donations of assets that are of questionable moral criteria or are too difficult to immediately liquidate.

**To give stock to Emmanuel Lutheran Church:**

1. Call the church office and notify Lisa Heathcote that the gift is coming, the number of shares of stock and the company, the date the transfer will be made to the church, and to what specific pledge(s) or purpose(s) you want the gift credited.
2. Notify your broker to transfer X number of shares of stock to Emmanuel Lutheran Church's account at BB and T Investments.

Emmanuel Lutheran Church uses BB and T Investments as our brokerage firm for gifts to the church.

Contact for BB and T Investments:

200 S. College Street  
Charlotte, NC 28202  
1-800-453-7348

Account # 4V9-433341  
ETC # 0443

Date: August 2008