

Types of Giving

Marketable Securities – Transfer ownership of stocks, bonds or mutual fund shares

You receive an immediate income tax deduction for the fair market value of the securities you transfer. In addition, you pay no capital gains tax on the difference between your cost and the fair market value. Nativity is a tax-exempt organization, and therefore does not pay capital gains tax either. The steps and further information to make a stock gift are outlined below.

Planned Gifts / Giving retirement assets / Bequests / Trusts

There are several types of gifts that fall under this category, many of which are quite easy to make. These include:

Life Insurance: you can name Church of the Nativity as a beneficiary

Retirement Assets: you can name Church of the Nativity as a beneficiary of your IRA, 401(k) or other qualified retirement plans. A common gift we receive is from IRAs or 401(k)'s – parishioners send their Required Minimum Distribution (RMD) directly to Nativity and thereby avoid any income tax on their RMD while at the same time making a nice donation.

Bequests: you can name Church of the Nativity as a beneficiary in your Will - and your estate will receive an estate tax deduction for the value of your bequest. A bequest written in a Will can be made for a percentage of your estate, a specific dollar amount or for a particular asset, such as stock or real estate.

If you are interested in any of these ways to give, please contact us using the contact information below.



Marketable Securities

There are 2 steps needed to donate marketable securities to Church of the Nativity:

Step 1: Initiate the Transfer

You or your broker may electronically initiate the transfer of shares to Church of the Nativity's brokerage account. Please use the following information in order to deliver your securities:

Brokerage: Scottrade

Address: 600 Washington Ave, Suite 15, Towson, MD 21204

Phone: 410-825-0144

Account Name: Church of the Nativity

DTC: 0705

Account #: 21217786

Step 2: Notify Church of the Nativity

In order for your contribution to be attributed to correctly to you, please notify us of your intention to give securities. Please provide the following information by email or phone:

- Donor's full name and address
- Name and number of securities transferred
- Date of transfer
- Nativity program you wish credited (Offertory, Missions, Vision)