

Types of Giving

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

You receive an immediate income tax deduction for the full 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. Since Nativity is a tax-exempt organization, it does not pay capital gains tax either.

Planned Gifts – Giving retirement assets, bequests, trusts, etc.

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

Life Insurance: you can simply 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. Any amounts remaining in your plan will transfer to Church of the Nativity, free of income and estate tax.

Bequests: you can name Church of the Nativity in your will as a beneficiary, 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 specific 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 give marketable securities to Church of the Nativity:

Step 1: Initiate the Transfer

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

Brokerage: TD Ameritrade

Address: 200 S 108th Avenue Omaha, NE 68154

Phone: 410-616-2001

Account Name: Church of the Nativity

Account #: 422204393

DTC #: 0188

Step 2: Notify Church of the Nativity

In order for your contribution to be attributed to the correct fund, notifying us of this information will help us serve you better. Please provide the following information by email or phone:

- Donors full name and address
- Name of security and number of shares transferred
- Date of transfer
- Name of the fund you would like these securities to go toward (i.e. Offertory)