



## Procedures for donating stock to Holy Cross Lutheran Church

- First call Susan Muhl at the church office (317-823-5801 x 225) or email her at [smuhl@hclc.info](mailto:smuhl@hclc.info) and let her know you would like to donate stock. At that time, please inform her of the kind of stock (i.e. Eli Lilly, etc.) and number of shares that you are donating. She will then contact our broker, TD Ameritrade, so that they will be expecting your donation.
- Download a copy of the stock transfer form from the church website [www.hclc.info/downloads](http://www.hclc.info/downloads) and follow the instructions outlined on the form. This includes sending a copy to Susan Muhl at the address provided on the form.
- Make sure to fill out the bottom of the form to let us know how you would like the proceeds allocated. The **Church General Fund** is for use by the church for daily expenses associated with running the church. The **Building Fund** is for the “For Those to Come” capital campaigns, and the **School General Fund** is for the daily activities of the school such as curriculum and supplies. You may allocate all of the stock donations to one fund, or split it between two or more funds.
- Contact your broker and follow the procedures they need to complete the transaction.
- Once the transaction is complete and we have received a check representing the proceeds from TD Ameritrade, we will record your stock contribution as a “Gift in Kind” donation. We will not place a value on the stock, as we are not, by law, allowed to do so. The stock value must come from your broker. It will, however, be listed on your End of Year Giving Statement as “50 (or your amount) shares of stock” under the “Gifts in Kind” portion of the statement.
- If you have questions about giving stock, you may contact Susan Muhl at the church office at 317-823-5801 x225.
- Thank you so much for your generosity!

