ST. JAMES ON-THE-GLEBE

ANGLICAN CHURCH

GLOUCESTER, VA

End of the Year - Gifts of Stock / Bonds / Other Equities

St James On-The-Glebe can receive investment securities/equities donations through our Fidelity Non-Profit Investment Account.

The advantage of donating stocks or bonds to the church is it allows the donor to avoid capital gain taxes on the stock's increased value. And to receive a charitable contribution tax deduction for the stock's total market value at the time given.

To transfer stock, please provide your brokerage firm with the following information:

 Fidelity Investments - Depository Trust Company (DTC) number – 0226

 Fidelity Investments - Routing number – 101205681

 St James On-The-Glebe Anglican Church Account number – Z40339121

To transfer cash, please provide your bank or brokerage firm with the following information:

 Fidelity Investments - Routing number – 101205681

 St James On-The-Glebe Anglican Church Account number – Z40339121

 To send a check in the mail, please forward to:

 St James On-The-Glebe Anglican Church

 6124 Abingdon Glebe Lane

 Gloucester, VA 23061

St James will provide the required end-of-year tax return document for each donation.

Don't hesitate to contact me if you have any questions about gifting stock to the church.

Roy Bertram

SJOTG Bookkeeper

treasurer@stjamesontheglebe.com

850.377.3823