



Stock Gift Transfer Instructions

Thank you for your generous decision to support Reclaim's mission through a gift of appreciated securities. Stock gifts are a tax-smart way to maximize your charitable impact while minimizing your tax burden.

- **IMPORTANT:** To receive the full tax benefits, securities must be transferred directly to Reclaim. Please do NOT sell your securities and donate the cash proceeds, as this will trigger capital gains tax.
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Step-by-Step Transfer Process

Step 1: Contact Your Broker

Contact your brokerage firm and inform them you want to make a charitable stock transfer to Reclaim Ministries.

Step 2: Provide Reclaim's Account Information

Give your broker the following information for the transfer:

Receiving Organization: Reclaim Ministries, INC

Federal Tax ID: 47-1215089

Receiving Broker: *Pershing LLC*

Account Name: *Reclaim Ministries, INC*

Account Number: *RA1021626*

DTC Number: *0443*

Contact Person: Patrick T. Furey CLU, RICP, CLTC

Financial Advisor, Business and Estate Planning

Phone: 330-668-6176

Step 3: Specify Your Transfer Details

Provide your broker with:

- **Securities to transfer:** Stock symbol, number of shares, or dollar amount
- **Type of transfer:** Charitable gift transfer
- **Your contact information** for any questions

Step 4: Notify Reclaim

CRITICAL: Please notify us immediately of your intended stock gift by contacting:

Patrick T. Furey CLU, RICP, CLTC

StrategicGiving@RECLAIMministries.org

330-668-6176

Please provide:

- Your name and contact information
 - Type and approximate value of securities being transferred
 - Expected transfer date
 - Any designation for your gift (general ministry, specific program, etc.)
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Important Transfer Details

Timeline

- **Electronic transfers (DTC):** Typically 1-3 business days
- **Physical certificates:** 5-10 business days (requires additional handling)
- **Mutual fund transfers:** May take 5-7 business days

Valuation Date

The fair market value of your gift is determined by the **average of the high and low prices on the date the securities are received** in Reclaim's account, not the date you initiate the transfer.

Documentation

- Your broker will provide confirmation of the transfer
- Reclaim will send you an official gift acknowledgment for tax purposes
- **Keep all documentation** for your tax records

Transfer Checklist

Before initiating transfer:

- ☐ Securities have been held for more than one year (for maximum tax benefit)
- ☐ You have Reclaim's complete account information
- ☐ You've determined the approximate current value

During transfer:

- ☐ You've contacted your broker with transfer instructions
- ☐ You've provided all required account information, including Reclaim's Tax ID Number
- ☐ You've notified Reclaim of the pending transfer

After transfer:

- ☐ You've received broker confirmation
- ☐ You've received Reclaim's gift acknowledgment
- ☐ You've filed documentation for tax purposes)

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Frequently Asked Questions

Q: How long does a stock transfer take?

A: Most electronic transfers complete within 1-3 business days. Physical stock certificates may take longer.

Q: What if my stock value changes during the transfer?

A: Your charitable deduction is based on the fair market value on the date Reclaim receives the securities, not when you initiate the transfer.

Q: Can I transfer mutual fund shares?

A: Yes, but mutual fund transfers may take longer and some funds have specific transfer requirements. Contact us for assistance.

Q: What if my broker is unfamiliar with charitable transfers?

A: This is common. Have them contact Reclaim's receiving broker, Patrick T. Furey directly at 330-668-6176 for assistance.

Q: Can I transfer stock held in an IRA or 401(k)?

A: Securities must be transferred from taxable investment accounts. Retirement account distributions have different rules (see [IRA Charitable Rollover](#) information).

Need Help?

Stock Transfer Questions

Patrick T. Furey CLU, RICP, CLTC

StrategicGiving@RECLAIMministries.org

330-668-6176

General Giving Questions

Todd Ickes

720-663-8764

Todd@RECLAIMministries.org

Mailing Address

Reclaim Ministries, INC

25587 Conifer Road, Suite 105-311

Conifer, CO 80433

Federal Tax ID: 47-1215089

Thank you for your partnership in seeing all men fully alive. Your strategic gift of appreciated securities maximizes both your tax savings and your Kingdom impact. We are grateful for your generous heart and wise stewardship!

Disclaimer: This information is provided for general guidance only. Please consult your tax advisor or financial planner regarding the specific tax implications of your charitable gifts.