

STEWARDSHIP

Financial giving is an important element of our spiritual relationship with God. According to Herb Miller, author of *Full Disclosure*, there are twenty financial stewardship themes that recur and evolve in the Old and New Testaments. *Full Disclosure* identifies these themes, lists their historical importance, and illustrates contemporary application for each theme. The themes fall into three categories: (1) Why should we give? (2) How does giving benefit us? And (3) How should we give?

Anyone looking for practical information and help in planning for preaching or teaching about financial giving will find this book useful. Four stars from Amazon.com: \$10.50. Try on these eight principles of Christian Stewardship, as adopted by the Missouri Synod Lutheran Church, and see what further thoughts and biblical support they excite in you! Christian Stewardship is the free and joyous activity of the child of God, and God's family, the church, in managing all of life and life's resources for God's purposes.

I. GOD'S STEWARDS ARE GOD'S STEWARDS.

God's stewards are stewards by virtue of creation and their re-creation in Holy Baptism; therefore, they belong to the Lord.

Is. 43:1 But now, this is what the Lord says—he who created you, O Jacob, he who formed you, O Israel: fear not, for I have redeemed you. I have summoned you by name; you are mine.

Rom. 6:4 We were therefore buried with him through baptism into death in order that, just as Christ was raised from the dead through the glory of the Father, we too may live a new life.

II. GOD'S STEWARDS ARE MANAGERS, NOT OWNERS.

God's stewards have been entrusted by God with life and life's resources and given the privilege of responsibly and joyfully managing them for Him.

Ps. 24:1 The earth is the LORD'S, and everything in it, the world, and all who live in it.

1 Chron. 29:14 But who am I, and who are my people, that we should be able to give as generously as this? Everything comes from you, and we have given you only what comes from your hand.

III. GOD'S STEWARDS ARE SAINTS AND SINNERS.

God's stewards rejoice in and live out what God has declared them to be through the cross. At the same time His stewards recognize they are sinners who fight sin and its consequences each day.

1 John 3:1-2 How great is the love the Father has lavished on us, that we should be called children of God! And that is what we are! The reason the world does not know us is that it did not know him. Dear friends, now we are children of God, and what we will be has not yet been made known. But we know that when he appears, we shall be like him, for we shall see him as he is.

IV. GOD'S STEWARDS ARE UNIQUELY SINGULAR, YET PROFOUNDLY PLURAL.

God's stewards recognize that their lives are not solo performances but are personal responses to God, lived out within the community of faith to benefit the whole world.

1 Pet. 4:10 Each one should use whatever gift he has received to serve others, faithfully administering God's grace in its various forms.

V. GOD'S STEWARDS ARE IN THE WORLD, BUT NOT OF THE WORLD.

God's stewards recognize that the Lord sets them apart from the world and by the transforming power of the Gospel sends them into the world to live out the Gospel.

John 16:33 I have told you these things, so that in me you may have peace. In this world you will have trouble. But take heart! I have overcome the world.

VI. GOD'S STEWARDS ARE LOVED AND LOVING.

God's stewards recognize that their stewardship flows out of God's act of love for them in Christ which empowers them, in turn, to love others in acts of Christ-like love.

Gal. 5:6b The only thing that matters is faith expressing itself through love.

VII. GOD'S STEWARDS ARE SERVED AND SERVING.

God's stewards recognize that their stewardship involves a Gospel-powered style of life which is demonstrated in servanthood within all the arenas of life.

John 13:15-17 I have set you an example that you should do as I have done for you. I tell you the truth, no servant is greater than his master, nor is a messenger greater than the one who sent him. Now that you know these things, you will be blessed if you do them.

VIII. GOD'S STEWARDS LIVE WITH AN AWARENESS OF THE PRESENT AND FUTURE, OF TIME AND ETERNITY.

God's stewards live intentionally in the light of God's eternal purpose while being firmly committed to His rule in the here and now.

Phil. 3:12-14,20 Not that I have already obtained all this, or have already been made perfect, but I press on to take hold of that for which Christ Jesus took hold of me. Brothers, I do not consider myself yet to have taken hold of it. But one thing I do: Forgetting what is behind and straining toward what is ahead, I press on toward the goal to win the prize for which God has called me heavenward in Christ Jesus. But our citizenship is in heaven. And we eagerly await a Savior from there, the Lord Jesus Christ.

2 Pet. 3:11-12a Since everything will be destroyed in this way, what kind of people ought you to be? You ought to live holy and godly lives as you look forward to the day of God and speed its coming.

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The following considerations of planned giving opportunities in no way constitute tax or legal advice by the diocese of Alaska. Please consult your attorney or tax preparer before making final arrangements for transfer of property, securities or cash.

What is a Planned Gift?

A planned gift is any gift made with the involvement of another person. For instance, a bequest is made through a Will and real estate is given through a Deed prepared by an attorney; a gift of stock is made with the help of a broker, mutual fund, transfer agent, etc. Gifts can be either deferred or current. This means you can give away the gift today, or later. A bequest is an example of a deferred gift and a gift of securities is an example of a current gift.

Why Should I Make a Planned Gift?

You can teach those you love about the importance of giving, how to give, and the place of the Church in your life.

You can give assets other than cash.

You can avoid paying capital gains taxes on your gift.

You can make a larger gift than you thought possible.

You can pass sizable assets to your children and grandchildren, free of estate and gift taxes.

The gift can pay you income for life and then to another person for life.

You can make a gift that does not cost you anything now and that can be revoked at any time.

You can be creative in making your gift by giving assets that you are not using or that are paying a yield less than 6%.

You can aid the specific ministries of the Church that interest you.

What Planned Giving Can Do For You

Pay you a stream of income for your life and/or the life of another.

Increase the income you may be receiving from an investment.

Provide a charitable income tax deduction.

Reduce or eliminate capital gains taxes or estate taxes.

Help your church and the diocese of Alaska

Enable you to leave a legacy for the next generation.

Can I See What the Gift Will Look Like?

YES. Through our partnership with The Episcopal Church Foundation, they can provide projections to you and your financial advisors using the best software available. Based on certain information you give them and certain economic assumptions, they can describe the expected financial consequences to you and your church, including tax deductions and income. Or you may take advantage of the on-line analysis instrument available at: www.ecf.giftplanning.org

If you wish personal assistance, contact our partners at The Episcopal Church Foundation at: 800-697-2858 or E-Mail to: Matt Freeman at matt@episcopalfoundation.org.

If you are uncertain of the gift you want analyzed, they will be happy to make a suggestion. The projection will tell you the amount of income you could receive, the tax deductions, the savings you receive compared with selling the asset, the expected gift to the church, and more.

What Assets Can I Use to Make a Planned Gift? *Cash or Check, Appreciated Securities, stock in Native Corporations, and "closely-held stock", Tangible Personal Property, Real Estate, Life Insurance, Whole or Term, Retirement Funds and Assets*

A Check or Cash: Cash or a check is always an acceptable gift to your church or diocese. We will return a receipt for your gift. You will need it to receive a tax deduction. Always make the check payable to the church or diocese, never an individual. Bank accounts can also be made payable upon death (POD) to your church or diocese. This will make them pass directly to your choice upon your death.

Appreciated Securities: Gifts made with appreciated publicly traded securities such as stocks, mutual funds, and bonds provide attractive benefits. Making a gift of securities held for more than a year can eliminate capital gains taxes and, in most cases, the donor obtains a charitable income tax deduction equal to the market value of the securities. Appreciated securities that are not paying a competitive dividend or are not appreciating significantly might be especially advantageous to you as a gift to your church or diocesan ministries. Using appreciated securities at year-end is even more beneficial.

An owner of closely held stock may give the stock to their church or diocese and receive important financial benefits. A very attractive feature of this gift is the practice of a company repurchasing the stock from the Church, which allows it to retain the company's private control and who instead transfers cash to your chosen recipient.

Gifts can be made outright or through one of the charitable gift arrangements discussed here. The transfer of stock is easy. You can have the stock transferred to a brokerage account opened for the church or diocese at your broker, or to the church or diocese's existing brokerage account, or by the transfer agent. Remember: the gift doesn't legally occur until the church or diocese owns the stock. The means to do this are included elsewhere on this document, entitled Transfer of Stock.

Real Estate: Real estate includes vacant land, homes, condominiums, commercial property, rental property, and others. If the property has been owned for at least a year and appreciated significantly, a gift of real estate will eliminate capital gains taxes and broker's commissions if the property were sold. The gift also gives the donor a chance to change investments.

If you are thinking of giving real estate, do not sell it yourself. If you do, you will have to pay any taxes owed on the appreciation. If it is sold by the Church (even if you find the buyer), you can receive a charitable deduction for the entire value without paying any capital gains taxes you might otherwise owe.

Donors can make an outright gift or they may retain some interest in the property, such as the right to live in it for the rest of their lives. You can also place the property in a trust. You can give a fractional interest in the property. Real property may also be given to the church through your Will. The property must be unencumbered, that is, no money may be owed on the property when it is transferred to the Church; and an inspection of the property may be required by the parish or diocese before accepting or refusing the gift.

Life Insurance policies: All insurance policies allow you to name one or more primary, secondary, and contingent beneficiaries. You can give some or all of the proceeds from an insurance policy to a Church by naming the church or diocese as one of the primary, secondary, or contingent beneficiaries. Naming the church or diocese as a contingent beneficiary means they receive all or part of the proceeds if none of the other beneficiaries survive you.

There are basically two types of life insurance: Term and Whole Life. Term insurance is commonly called pure insurance because the premium is only to insure your life for a term of one year. Whole life is insurance coupled with an investment. Once you have paid your

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premium in full, you can surrender the policy and receive the cash value.

Retirement Funds (401(k); 403(b); IRAs, Keogh, SEP, Qualified Plans): All retirement funds allow you to name one or more primary, secondary, and contingent beneficiaries. You can include the church or diocese among the named beneficiaries of your retirement plan(s). Retirement funds can be among the best assets to use for a charitable gift. The reason involves the fact that they grow without paying income taxes. If you give them to an individual upon your death, income taxes and estate taxes may dramatically reduce the funds. Your loved ones may only receive a fraction of their present value. Check your situation with your accountant.

However, any gifts of retirement funds to a church or diocese are made free of any income or estate tax because the gift to the Church receives a charitable deduction. You can also make this gift without going to a lawyer or incurring any fee or charge. Check with your accountant or human resources department at your employment.

These funds are also passed by naming a beneficiary. If none is named or all are deceased, the assets become part of your estate and pass according to the Will or laws of intestacy if there is no Will. Retirement funds can be among the most valuable assets you own. They accumulate tax free and thereby grow much faster than taxable assets.

Tangible Personal Property: Tangible personal property is anything you can touch, except real estate. Also, it does not include money or securities of any kind. They are intangible. In order for the owner to take advantage of the largest tax deduction, the charity must use the property for a related use. This means the church uses the gift for a purpose related to its charitable purpose. If the gift is so related, the donor may deduct the full appraised value of the gift. Otherwise, the donor can only deduct his/her original cost of the gift. Tangible personal property can be delivered to a charity during the donor's lifetime, or it can be given to the charity through the donor's Will.

What Are Some Examples of Planned Gifts?

Gifts made through your Last Will and Testament: A gift through your will (a bequest) can provide significant support to the Church. It also provides the following benefits: (a) the opportunity to make a major gift while preserving assets during life; (b) reduction in federal estate taxes; (c) the opportunity to designate the gift to a specific program at your Church or ministries and endowments of the diocese. Remember, your will only passes probate assets. It does not transfer assets that designate a beneficiary, such as life insurance. Arrangements to make a gift of these assets are included elsewhere in this document.

A gift through your will can be made in the following ways:

Specific Bequest: Your church or the diocese receives a specific dollar amount, a specific piece of property, or a stated percentage of the estate. This is one of the most popular forms of bequests.

Residuary Bequest: The church or diocese will receive all or a stated percentage of an estate after distribution of specific bequests and payment of debts, taxes, and expenses.

Contingent Bequest: The Church or diocese will receive part or all of the estate under certain specified circumstances.

Trust Established Under a Will: A trust may be established that provides for both the Church and other beneficiaries, such as the diocese of Alaska.

Life Income Gifts: A donor may make a gift to the Church and receive direct financial benefits. The benefits include an income for life to the donor and/or the donor's spouse and a charitable income tax deduction, in addition to the good feeling that comes from making a gift. There are several forms of the gifts. They can provide you with an immediate income of a variable or fixed rate, or you may want a gift that will give you a fixed rate of return some time in the future. This last form is especially useful in retirement planning. In determining which life income gift is most appropriate, the following questions should be answered:

- What is the age of the donor and/or the donor's spouse?
- Will the gift be based on one or two beneficiaries?
- Will the gift be funded with cash, appreciated securities, or real estate?

Benefits of Life Income Gifts:

- Income paid to the donor for lifetime and/or spouse's lifetime
- A charitable income tax deduction
- Possible avoidance of capital gains taxes on appreciated property
- A higher yield than from current investments
- A reduction in federal estate taxes

Charitable Remainder Trust: A charitable remainder trust provides a donor with a lifetime income and a charitable income tax deduction. The donor selects the payout rate, usually between 5% and 7%. The higher the payout rate, the lower the charitable income tax deduction. This gives the donor, and perhaps the donor's spouse, an income every year for life. If the donor funds the trust with appreciated securities, the donor will avoid capital gains taxes.

Donors may choose from two types of charitable remainder trusts: the annuity trust and the unitrust. The annuity trust pays a fixed, guaranteed dollar amount regardless of the trust's investment performance. The unitrust pays the donor a predetermined percentage of the fair market value of the trust's assets as revalued annually.

Benefits:

- Avoid capital gains taxes on the transfer of appreciated property.
- Increase dividends ranging from 2% to 4% to dividends as much as 6% or more.
- Obtain a charitable income tax deduction.
- Provide income to one or two beneficiaries for life
- Establish or contribute to an endowed fund at your church or diocese.

Charitable Lead Trusts: A lead trust is the opposite of a charitable remainder trust. The "lead" income is paid first to your Church, and after a number of years (based on a term or a lifetime) the remainder is returned either to the grantor (a grantor lead trust) or to someone other than the grantor, such as the grantor's beneficiaries (a non-grantor lead trust). It is an extremely tax efficient way of passing assets to future generations while, at the same time, making a large donation to the church. The church is given a stream of dependable annual income to carry out its mission. The donor may be able to pass the asset to heirs at a very low tax cost.

Benefits:

- Philanthropic satisfaction
- Principal returns to donor
- Tax deduction taken in the year of the gift
- Church receives outright gift for term of trust
- Church can plan for longer range ministry

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Life Insurance: The need for insurance coverage usually lessens as we age. By then, insurance has served its original purpose of protecting our families and it can now be used for other purposes.

There are two types of insurance: Term insurance protects us for a stated term, usually one year. Whole life buys the policyholder a death benefit and will also pay the holder the cash value of the policy if he/she terminates the policy before death.

A life insurance policy can be given as an outright gift. The donor gives up all rights of ownership in the policy and thereby receives an income tax deduction.

A donor can also name a charity as a total or partial beneficiary of the policy, continue to maintain the policy, and receive charitable tax deduction for premiums he or she makes to keep the policy in force. You have to change the beneficiary form.

In making a gift of life insurance, you may:

- Make a gift of an existing life insurance policy.
- Establish a new policy and name your Church as the owner of the policy.
- Use life insurance to replace the value of gifts to the Church.
- Change your beneficiary to give a proportion to the church.

Retirement Plans: These plans include IRAs, Section 401(k) and 403(b) Plans, Qualified Pension Plans, and Qualified Profit-Sharing Plans. You can transfer all or part of these assets to a charity. These options include an outright gift, designation of a beneficiary, bequest, and transfer to a charitable remainder trust.

Designation of beneficiary: A donor can designate a charity or church to receive all or a stated percentage of a retirement account upon death. The donor receives an estate tax charitable deduction. Please note: As regards some retirement plans, your spouse must also sign a statement agreeing to include the church as a beneficiary.

Bequest: In the absence of a beneficiary designation, you can transfer your retirement accounts upon your death through your will. A bequest of a retirement account should be specifically to a parish or diocesan ministry to avoid income taxation of the funds.

Trust: If the plan permits, a donor may transfer the account to a charitable remainder trust. The plan donor will be taxed only on the funds received by him/her. At death, the balance will be paid to a charitable remainder trust, which can pay income to one or more beneficiaries for life, with the remainder going to the charity or ministry of your choice upon the death of the last beneficiary.

“From Generation to Generation”

As Episcopalians we are asked to examine our priorities and find a way to give from the extraordinary gifts which our Lord has blessed us. One way to do that is to remember your congregation, or any diocesan or national church program or ministry with a planned gift. The simplest way to provide a permanent source of support for your Episcopal Church is through a bequest in your will.

On page 445 of the Book of Common Prayer the rubric reminds us “The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families...not neglecting, if they are able, to leave bequests for religious and charitable uses.” Nearly 50% of Americans die without a written will. In that case the state will make decisions for your family which they must then follow. You cannot provide for minors. The court will appoint a guardian for them, and the guardian will make decisions about the child’s care which you might not have made.

For purposes of inheritance, Alaska is not absolutely a “community property” state. If you are married, most of what you have you own jointly with your spouse. But not necessarily everything. At the death of a spouse who does not have a will, the survivor will normally receive the community property of the deceased, but not necessarily all of the separate property.

When the survivor - or any unmarried person - is called to his or her reward without a will, the Probate Court of the State of Alaska will decide what is to be done with the assets in accordance with the laws of the state. What difference does it make? Won’t the court give your assets to your next of kin? Probably, but not to your special friend, not to your church or your school or other favorite charities. In the absence of a will that expresses your wishes clearly and legally, the court will decide according to a formula; it will not consider the special needs of any of your family members.

You can only be certain that your wishes will be carried out as you intend if you make a will and update it every few years or every time your situation changes significantly, such as when: moving to another state, your children mature, your marital status changes, a family member is born or dies, you retire, etc.

Making a will is your opportunity to express in legal terms your priorities and concerns for the people and institutions in your life. The rubric from the Book of Common Prayer reminds readers “. . .to leave bequests for religious and charitable uses.” This offers you a threefold opportunity: to support your church, to be a part of the life of the church community after you have left this life, and to make a witness to your family and friends of what was important and valuable in your life.

The Development Office of the Diocese of Alaska is eager to help individuals and congregations to further develop their financial discipleship. Including:

- * Wills/estate planning seminars
- * Individual consultation from a professional gift planning specialist through our partnership with the Episcopal Church Foundation

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- * Model language to include the Church in your will
- * Preaching & spiritual guidance on the theology of stewardship and planned giving—financial discipleship, or a God-centered relationship to money
- * Help with establishing an endowment fund for local congregations or other diocesan ministries
- * Referral to attorneys or professional gift planners to assist individuals

Why does everyone need a will?

With a Will:

You can direct the distribution of your assets to those you care about most.

You can choose a personal representative (executor) who will oversee the distribution of your assets.

You avoid unnecessary expenses on the administration of the estate.

You can provide appropriately for minor children by naming a guardian or establishing a trust.

You can provide for family members, friends, or relatives according to their needs.

You can save considerable estate tax by utilizing proper estate planning techniques.

You can provide support for charitable causes that have had special meaning for you.

You can give a last and lasting testimony of what mattered most to you in this life, and provide a compass for others to steer by in their own.

Without a Will:

State statute determines the distribution of your property.

The court appoints an administrator for you.

Because the administrator is subject to constant court supervision, the cost of administering the estate may be greater.

You cannot provide for minors. The court will appoint a guardian for them, and the guardian will make decisions about a child's care which you should have made.

Your heirs will not necessarily benefit in proportions or amounts you would have intended.

Your estate may lose thousands of dollars in needless taxes because you did not take advantage of the tax-saving opportunities available to you.

You cannot support a charitable cause.

Where to Give?

You may wish to give to a specific ministry within the diocese of Alaska, or you may wish to make an unrestricted gift. You may wish also to increase the endowments of our diocese. To help in your decision, some particulars of these ministries are below:

The Alaska Endowment provides additional funds to our annual operating budget, without restriction of ministries within that budget.

The Rt. Rev. Mark MacDonald Major Gifts Campaign provides to "The Hudson Stuck Fund for Mission Travel" and "Keeping Jesus as the Light in the Wilderness", "The Case for Father David Salmon School of Ministry".

Faith Into Tomorrow Endowment provides grant monies in areas of evangelism, congregational development, leadership training, and social services/outreach.

Bishop's Discretionary Endowment provides earnings for bishop's discretionary use.

Bishop's Discretionary Fund provides immediate money for bishop's discretionary use.

Bishop's Travel Fund provides for support of bishop's travel.

David Salmon School of Ministry provides for lay and clergy opportunities in pastoral, educational and practical skills development.

John Starr Youth Development Fund provides increased support of youth-centered parish based programs, such as Sunday School materials and teacher training.

Norm Elliott Scholarship Fund provides increased support for ministry development.

Native Evangelism Support Team provides support, primarily travel costs, for Episcopal Alaska Native evangelists in their work throughout Alaska.

Special Needs Fund provides one-time support of parish ministry opportunities.

Prison Ministries Fund provides support of ministry to Alaskan and Arizona prisons, especially in outreach to Alaska Natives incarcerated out-of-state.

Education for Ministry (EFM) provides a four-year seminary based, mentor-led survey course of Bible, Theology, Church History, and Liturgy (worship).

HOW TO MAKE A GIFT OF STOCK

INFORMATION ON STOCK TRANSFERS TO THE DIOCESE OF ALASKA, ITS MEMBER CONGREGATIONS, AND OTHER EPISCOPAL MINISTRIES

Securities may be the best asset for you to give to support programs of the Diocese or your congregation or other Episcopal ministries, in light of certain tax advantages. If you give appreciated securities that you have held for at least one year and a day, you can deduct the full fair market value (both the amount you paid and your gain), up to 30% of your adjusted gross income in the year of the gift. Any excess may be deducted over the next five years. By giving securities to the Church you avoid paying capital gains tax as well as ordinary income tax. If the gift is valued at more than \$500, you will need to fill out IRS Form 8283 and submit it to the Diocese.

The Diocese will acknowledge receipt of the gift on this form and return it to you so that you may comply with all IRS regulations.

How to Make the Stock Transfer—A letter of instruction (see sample letter on next page) should be sent to three places:

1. Your broker
2. Diocese of Alaska brokerage firm (UBS Financial Services Inc., see address below)
3. Diocesan Planned Giving Office, 1205 Denali Way, Fairbanks Alaska 99701

The letter should indicate the church, diocesan program or purpose you wish to support. Electronic transfers are the most efficient method. However, if you have the stock certificates in your possession, you should send the unendorsed stock certificates and a signed stock power (available from your broker) in separate envelopes to our broker.

If your broker holds the security for your account, instruct the broker to transfer the securities electronically to **the Episcopal Diocese of Alaska, UBS account UC-17656, DTC #0221**. If there are questions, have your broker contact the diocesan brokerage firm at UBS for specific details.

* Account Name & Number: Episcopal Diocese of Alaska, UBS #UC-17656

* Tax ID Number 92-0016730

* DTC: #0221

- Broker for the Diocese: Michael Meek
UBS Financial Services Inc.
3000 A Street, Suite 100
Anchorage, AK 99503-4087
(206) 261-5974, (206) 261-5966

- Purpose of gift: Include specific instructions regarding the congregation, program, and purpose of your gift. Be aware that electronic transfers can take a week or more and certificates can take a month or more.

How is the Value of Securities Established?

For income tax purposes, the value of a gift is the median market value on the day the gift is made. If a security is listed on a recognized stock exchange, the median market value represents the mid-point between the high and the low of the listed stock on the day the gift is made. The date the gift is made is determined by any of the following:

- When it has been hand delivered to the parish or diocese
- When received by the broker or agent for the parish or diocese (not the donor's)
- The date the securities are mailed to the parish or diocese or its broker or other agent
- When delivered to the parish or diocese by the donor's broker or agent
- When transferred to the parish or diocese on the books of the corporation if the donor delivers stock certificate to his/her bank or broker as the donor's agent, or to the issuing corporation or its agent, for transfer into the name of the parish or diocese

Always check with your own tax adviser when you contemplate a major gift of stock.

Thank you for your gift of stock to support the Episcopal Church. For more information about including your parish or the diocese in your will or estate plans, contact the Planned Giving Office at (907) 452-3040.

“Glory to God whose power, working in us, can do infinitely more than we can ask or imagine: Glory to him from generation to generation in the Church, and in Christ Jesus for ever and ever.”
Ephesians 3:20,21

HOW TO MAKE A GIFT OF STOCK—SAMPLE LETTER

Mail a copy to the Diocesan offices, to your broker, and to the Diocesan broker.

Your Return Address

Your Phone Number

Date

Inside address (to your broker)

Dear _____:

Please transfer (number) shares of (Name of company, common or preferred) stock (“ticker” symbol _____) from my account (brokerage or custodial account # _____) to the Episcopal Diocese of Alaska account # UC17656 , Distribution Account, DTC #0221, at UBS Financial Services, Inc.

The Tax ID number of the Diocese is 92-0016730, and its address is:

Diocese of Alaska
1205 Denali Way
Fairbanks, AK. 99701
(907) 452-3040

This gift is for the benefit of (congregation or diocese or program) in (city and state) for the following purpose (s):

Sincerely,

(Signature in full)

Type your Name

Cc: Diocese of Alaska, Planned Giving Office, 1205 Denali Way Fairbanks, AK. 99701