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# ASSUMPTION PARISH

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91 Maple Avenue, Morristown NJ 07960

[www.assumptionparish.org](http://www.assumptionparish.org)

## **Assumption Church Stock Transfer Instructions**

Securities held by a broker may be delivered by wire transfer through the Depository Trust Company (DTC) to our brokerage account. PLEASE BE SURE THE CORRECT ACCOUNT NAME IS ON THE TRANSFER TO AVOID ANY TRANSFER PROBLEMS. Instructions should be given as follows:

LPL Financial – Ryan Brunnock  
1055 LPL Way  
Fort Mills, SC 29715  
(973) 936-1982

**DTC#: 0075**

**Account#: 76670474**

**Account Name: CHURCH OF THE ASSUMPTION OF THE BVM**

When making a transfer, please inform the parish by contacting Robyn Morris to ensure that our broker can be alerted to accept the securities and so that we can acknowledge your gift correctly.

**Robyn Morris**

**(W) (973) 539-2141 EXT:24**

**(C) (973) 879-3018**

**(E) [rmorristown@optonline.net](mailto:rmorristown@optonline.net)**

**Thank you for your generous gift and your continued support of Assumption Parish**



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## Donate stock to maximize tax savings!\*

Say you bought \$500 worth of stock several years ago and now it's worth \$2,500. Instead of selling it, you can donate it to Assumption and save a bundle on taxes:



\$2,500



**Proceeds to Assumption**

\$500

+

\$750

=

Tax avoided on \$2,000 capital gain  
(assume 25% including federal + state) \*

Tax savings from \$2,500 charitable  
deduction  
(assume 30% personal tax rate  
including federal + state)



\$1,250

**Total Tax Savings**

Avoid \$500 in capital gains tax on the \$2,000 appreciation in value. Save another \$750 by deducting the \$2,500 charitable gift. Your total tax savings are \$1,250 – more than 2x your original investment!

\*Actual Capital Gains Tax ranges from 18.8% to 37.1%. Comprising Federal tax (15% or 20% + 3.8% NII tax) and State tax (41 states tax gains at 0% to 13.3%)

**\*Disclaimer: Assumption Parish does not provide tax advice. This is informational only. Please speak to a tax professional before making any donations using stock.**