

Instructions for Donating Assets (Stocks, ETF's, Mutual Funds, etc.)

1. Prepare
 - a. A tax professional can help you maximize your donation and tax benefits! Compared with donating cash or selling your appreciated securities and contributing the after-tax proceeds, you may potentially increase your gift and tax donation by donating appreciated stocks, bonds, ETFs and mutual funds to Lighthouse.
2. Contact your Broker to make the transfer
 - a. Each broker (E.g., Charles Schwab, Fidelity, etc.) has slightly different processes for transferring assets as gifts to non-profit organizations, so please call your broker directly to confirm what the best method of transfer would be!
 - i. Some of these brokers have Donor Advised Funds that will allow you to send your assets to them, from which they will then send "grants" to Lighthouse. This works fine for us! Please just specify in the 'grant' what fund the check should be allocated to (general fund vs generosity initiative, etc.).
3. Contact our Finance Team
 - a. When you're sending assets our way (particularly if sending via direct transfer and not through a Donor Advised Fund where you can specify it for us) - please contact our finance team at bills@lighthousesouthbay.org to let us know which asset(s) you're sending over, when that transfer was initiated, and what fund(s) you want to allocate those assets to. Your broker may not tell us who the donation is from, so it's essential that you contact us so we can include your transfer on your annual giving statement.

Lighthouse's Brokerage Information:

Your broker may not require *all* of this information; use what is necessary!

Fidelity Investments

Account Ownership: Lighthouse Community Church of South Bay

Account type: Corporate

Account number: Z40-229623

Fidelity's Depository Trust Company (DTC) number: 0226

Fidelity Investments

Attn: TOA Receives

PO Box 770001

Cincinnati, OH 45277-0036

Lighthouse's EIN / Tax ID:

20-1568832

Please feel free to reach out to our Finance Team at bills@lighthousesouthbay.org if you have any other questions!

Instructions for Donating Cryptocurrencies

- Lighthouse does not accept direct transfers of cryptocurrencies, but many Donor Advised Funds (E.g., [Fidelity](#) or [Schwab](#)) do! We would recommend working with your tax professional and the specialists at companies like these to find a solution that works best for you. If you have further questions, you can contact us at Bills@Lighthousesouthbay.org.