



Gifts of Securities

Gifts of Securities – Stocks, Bond, Mutual Funds

For those who want to maximize the tax advantages of lifetime gifts.

Giving appreciated securities—stocks and bonds—can be tax efficient for the donor. If you make a gift of securities directly to Southwestern Baptist Theological Seminary (SWBTS), you will receive an income tax deduction—and gift credit with SWBTS—for the full market value, without paying any capital gains tax. If you were to sell these securities before making the gift, you would have to pay tax on any capital gains.

Please let the SWBTS Development Office know when you are making these kinds of gifts so that our Business Office can monitor arriving securities. Many times, we do not know from whom these gifts come, or their intended purpose.

Tax Treatment: No capital gain on transfer of assets or when SWBTS sells the assets. Fully deductible for itemizers (normally 30% but up to 50% of adjusted gross income). Excess may be carried forward for five additional years.

If you own securities in a brokerage account, these shares can easily be electronically transferred to SWBTS.

Please contact us for assistance if you own stock in certificate form.

Closely held stock and other securities that are not publicly traded work best when there is a mechanism for SWBTS to sell the gifted interest to other shareholders or to the corporation itself. For these gifts, the donor must usually obtain a qualified appraisal to claim a tax deduction.

Contact us for Assistance:

Email: giving@swbts.edu

Phone: 817-921-8830

Office of Institutional Advancement
Southwestern Baptist Theological Seminary
P.O. Box 22500
Fort Worth, Texas 76122

Complete and return SWBTS' Stock Transfer Form below



Southwestern Baptist Theological Seminary Gifts of Stock Transfer

Name _____ Date _____

Address _____

City _____ State _____ Zip _____

Phone Number(s) Work _____ Home _____

Please Designate my gift to _____ (SWBTS, Program, Fund)

Broker Name and Brokerage Firm _____

Type of Stock (Check One):

Common Preferred Restricted Publicly Traded Non-Publicly Traded Mutual Funds

Name of Stock _____

Number of Shares _____

The undersigned (Donor) authorizes the transfer of this stock to Southwestern Baptist Theological Seminary

Signature _____

1. Complete the Form
2. Print three copies
3. Sign each copy on the signature line.

Keep one copy for your records, send one copy to your broker, and send one copy to:

Southwestern Baptist Theological Seminary
Office of Institutional Advancement
Southwestern Baptist Theological Seminary
P.O. Box 22500
Fort Worth, Texas 76122
giving@swbts.edu

STOCK GIFTS:

For ELECTRONIC, DIRECT TRANSFER of Stock:

National Financial Services Corporation

For ACCOUNT # H9H-006947

DTC # 226

NSSC # 226