

Ways to Give – Appreciated Stock

Do you own stock that has increased in value? Have you owned this stock for more than a year? If you answered “yes” to both questions, we have good news for you! You can amplify your impact by donating appreciated stock to Grace Inspired Living, The Community at Rockhill and/or Lutheran Community at Telford. Many supporters find that giving stock actually helps them do more than what’s possible when giving cash. Your stock donation can help our residents for years to come.

Tax Savings

There’s more! You can enjoy a double tax benefit when you donate appreciated stock. You may claim a generous tax deduction for what the stock is worth today as opposed to what it cost you many years ago. You will also avoid paying capital gains tax on the transfer of the stock. This would not be the case should you decide to first sell the stock and then donate the proceeds.

How to Give

Giving stock to us is simple. By working with your broker, you can donate stock electronically or by registered mail. It’s also possible to name us as a beneficiary of your stock account(s) – a popular option for our supporters who desire more flexibility. Please see the second page of this document for Stock Transfer Instructions.

Whether you decide to give now or later, a gift of appreciated stock can help amplify your impact and create meaningful results for our residents.

We’re Here to Help

If you or your broker need more information about donating stock, bonds, mutual funds and other investments, please contact Alyssa Guers at (267) 203-1124 or notify us by email at aguers@graceinspiredliving.org.



Stock Transfer Instructions

Step 1 – Initiate the Gift

The first step is to notify your broker of your desire to make a gift of appreciated stock. You can then work with your advisor to select the stock that will be transferred to us. Here's the information you will need:

- Grace Inspired Living, 12 Lutheran Home Drive, Telford, PA 18969; Tax ID: 81-4735423
- The Community at Rockhill, 3250 State Road, Sellersville, PA 18960; Tax ID: 23-1472520
- Lutheran Community at Telford, 12 Lutheran Home Drive, Telford, PA 18969; Tax ID: 23-1611427

Step 2 – Send the Stock

Sending by Registered Mail:

If sending by registered mail, please send your unendorsed certificate(s) with a Stock Power Form and a Stock Waiver Form in separate envelopes to:

Grace Inspired Living

Attn: Alyssa Guers
12 Lutheran Home Drive
Telford, PA 18969

Sending Electronically:

If you are transferring stock electronically into our account, please contact Alyssa Guers at (267) 203-1124 and we will provide the investment account information.

Step 3 – Notify Us

To ensure your gift is processed in a timely manner, it's important that we know your stock gift is on the way. Please call Alyssa Guers at (267) 203-1124 or notify by email at aguers@graceinspiredliving.org.

Please Note: For tax purposes, the Gift Date is recognized as the date the shares enter our investment account or the date the stock is sent by registered mail. Your gift will be valued based on the average price (the mean between the highest and lowest selling prices) of the stock on the date of the gift.