

GIVING TO ST. MARK'S

Giving Cash:

1. Send **check** to St. Mark's and provide information on whether contribution is for on-going operations, a special area such as Discretionary or Flowers or Capital Campaign.
 - a. Checks can be hand-written or come from a financial institution in the form of an automatic payment/bill pay
2. If **giving on-line**, access Giving button on Church website,
 - a. Select Operations for annual items or regular special gifts
 - b. Select Capital Campaign for building pledges
 - i. You will be prompted to create an account using your email address
 - ii. Select Capital Campaign fund and enter required data
 1. Amount
 2. Begin date
 3. Payment method
 4. Frequency
 - a. Defaults are typically weekly or monthly
 - b. To give quarterly, semi-annually or annual, enter the item as a ONE TIME Gift with the appropriate **FUTURE** start date
 - i. No funds will be disbursed until that date
 - ii. Enter multiple transaction for future dates
 5. Method of Payment
 - a. ACH - similar to writing a check above. NO fees
 - b. Credit card – an approximate 2.5-3% charge is taken from any amount contributed

which goes to the Credit Card Company - depends on type of card used.

- i. \$100 results in \$97 being given to St. Mark's.
- ii. \$100.10 results in \$100 being given
- iii. You receive credit on your giving statement for the amount entered, not for the amount realized by St. Mark's.

3. Giving Stock

- a. Stocks and such can be given to the Church as a transfer to the Fidelity Investment Account. The value of the gift is its value on the date of receipt.
- b. **Receiving shares:** If a sender wants to give shares (stocks, mutual funds, or other securities) from an outside firm, he or she needs to contact that firm to verify delivery instructions. In addition to following the firm's specific instructions, the sender may need to provide the firm with these details:
- c. Your name, Social Security number (SSN), and your Fidelity account number
 - For the Benefit of: Saint Marks Episcopal Church
 - For final credit to: **Z50-317985**
 - **EIN: 52-1297986**
 - **12700 Hall Shop Rd, Highland, MD 20777**
 - **Email address: stmarkshighland@gmail.com**
 - **Phone number on account: 301-908-6548 (cell phone Kathleen A. Huffman, Treasurer)**
 - Account registration information, including the type of account you have (e.g., nonretirement) and its ownership (e.g., individual or joint)

- Nonretirement
- Ownership – Church – 501 (c)corporation
- Fidelity's Depository Trust Company (DTC) number, which is 0226
- Our name and address:
Fidelity Investments
Attn: TOA Receives
PO Box 770001
Cincinnati, OH 45277-0036

4. **Giving Real Property** – gifts of real estate (whole or in-part)
- a. The tax deduction is determined by the current value of the property, as opposed to the cost when originally purchased. The only expense with a real estate donation is a property appraisal and any title transfer fees. In Maryland, it may be as simple as a simple Deed transferring the property to St. Mark's (officially "The Vestry of St. Mark's Protestant Episcopal Church of Highland, Maryland" d/b/a St. Mark's Church, Highland, MD.
 - b. For a donation of a partial interest or such, contact the Treasurer for any additional requirements.
 - c. Contact your tax advisor/lawyer for more details.