

INSTRUCTIONS FOR STOCK DONATIONS TO SADDLEBACK CHURCH

- Your broker should have a Charitable Gift Stock Transfer form to complete that will need the following information. You can complete that form and provide it directly to your broker to execute the charitable contribution.

Here is an example of the information required:

Receiving Account Number:	9667-5811
Receiving Account Title:	Saddleback Valley Community Church
Receiving Institution Name:	Charles Schwab & Co., Inc.
Receiving Institution Contact Name:	Julie Hoffman
Receiving Institution Contact Email:	jhoffman@saddleback.com
Receiving Institution Contact Phone:	949-609-8065
DTC Number:	0164

- Please also email Julie Hoffman at jhoffman@saddleback.com with the following information:
 - Number of shares being donated with name and stock symbol.
 - Your current address.
 - Note: Stock donations will be applied to “tithe” unless you email Julie Hoffman at jhoffman@saddleback.com and designate a different fund.

Feel free to contact Julie at jhoffman@saddleback.com if you need further assistance.

Once the shares are received, we will send you an acknowledgment email or letter you can use for your tax deduction.

INSTRUCTIONS FOR DONOR-ADVISED FUND (DAF) DONATIONS TO SADDLEBACK CHURCH

- Saddleback Church is already known to most investment firms and non-profit organizations that offer Donor Advised Fund (DAF) instruments for tax-effective charitable giving.
- So, ask your investment firm or non-profit organization if they recognize **Saddleback Valley Community Church** as a charitable organization. If so, they can facilitate making your gift to Saddleback Church.
- If your investment firm or non-profit organization does not recognize Saddleback Church as a charitable organization, or if we have not had the occasion to register with the charitable fund you are using, please contact **Becky Breuklander** at beckyb@saddleback.com to get started. Alternatively, you can request that your charitable fund administrator contact Becky directly to begin the process of getting Saddleback Church registered with the fund.

INSTRUCTIONS FOR IRA DONATIONS TO SADDLEBACK CHURCH

- Consider giving a Qualified Charitable Distribution (QCD) to Saddleback Church from your IRA. We recommend you consult with your financial or tax advisor prior to making this decision. If you need any help, please contact giving@saddleback.com.
- Once you have decided to give via a QCD, you will likely find that **Saddleback Valley Community Church** is already listed as a charitable organization with your investment firm. If so, your firm can facilitate making the gift to Saddleback Church.
- If your investment firm does not recognize Saddleback Church as a charitable organization, please contact **Becky Breuklander** at beckyb@saddleback.com to get the process started.

Thank you for your generosity!

SADDLEBACK CHURCH
GIVING TEAM

