



# YOUR GUIDE TO STRATEGIC GIVING

Stock, QCD and DAF Gifts



## A guide to help you navigate the best way to give.

Thank you for your interest in supporting the mission of Global Partners! Your gift will help Global Partners mobilize missionaries and share the Gospel so more people have an opportunity to hear about Jesus.

*Please note, this information is not intended as legal or tax advice. Please consult your financial advisor. Your personal information will be kept confidential and used only for gift processing and acknowledgment.*



### Gifts of Securities (Stocks, Bonds, Mutual Funds)

Giving non-cash assets can help you reduce or eliminate capital gains tax when you transfer part or all of your assets to a charitable organization before the sale.

#### To make a gift of marketable securities:

1. Contact your broker and request a transfer to our account. Your broker may need the following information:
  - **Account Name:** The Wesleyan Church
  - **Receiving Broker:** Merrill Lynch
  - **DTC Number:** 8862
  - **Account Number:** 5EW-02293
  - **Tax ID / EIN:** 35-1148762 (\*EIN for The Wesleyan Church Corporation)
2. Notify us of your gift by contacting our Donor Services Team at [give@gponline.org](mailto:give@gponline.org) or 317-774-3944. Because gift details cannot be submitted with this type of donation, please include the following:
  - Your full name and mailing address
  - The stock name and symbol
  - The number of shares transferred
  - The intended fund designation (Global Partners Global Giving Fund or Global Partners and the specific project or missionary)
3. Once we receive the shares, we will:
  - a. Work with Merrill Lynch to sell the securities.
  - b. Send you a gift acknowledgement letter and receipt within two weeks. This can be used for tax purposes.
  - c. Direct the funds to your designated fund, project or missionary.





## Qualified Charitable Distributions (QCDs) from IRAs

Qualified Charitable Distributions (QCDs) from a retirement account are a great way to make a charitable gift and save on taxes. Donors aged 70.5 and older are eligible to make a distribution from their IRA directly to their favorite charities. You are not required to pay income tax on charitable withdrawals from these accounts, plus the sum you give will not be included in your adjusted gross income.

### To make a tax-free gift directly from your IRA:

1. Contact your IRA administrator and request a QCD to Global Partners. Your broker may need our mailing address and EIN.
  - **Mailing Address:** Global Partners Suite 400 13300 Olivo Rd. Fishers, IN 46037
  - **Tax ID / EIN:** 35-1148762 (\*EIN for The Wesleyan Church Corporation)
  - Please include the intended designation for the funds (Global Partners Global Giving Fund or Global Partners and the specific project or missionary).
2. Once we receive the QCD, we will:
  - Send you an acknowledgement letter that can be used for tax purposes.
  - Direct the funds to your designated fund, project or missionary.



## Donor-Advised Fund (DAF) Gifts

A personal giving fund, known as a Donor Advised Fund (DAF) is a simple way to give cash, real estate, stocks, mutual funds, or commodities. It allows you the flexibility to distribute gifts over time.

### To recommend a grant from your DAF:

1. Contact your fund manager and request a grant to Global Partners. Your fund manager may need our mailing address and EIN.
  - **Mailing Address:** Global Partners Suite 400 13300 Oilio Rd. Fishers, IN 46037
  - **Tax ID / EIN:** 35-1148762 (\*EIN for The Wesleyan Church Corporation)
  - Please include the intended designation for the funds (Global Partners Global Giving Fund or Global Partners and the specific project or missionary).
2. Once we receive the QCD, we will:
  - Send you an acknowledgement letter that can be used for tax purposes.
  - Direct the funds to your designated fund, project or missionary.

**\*This is the EIN for The Wesleyan Church Corporation.**

As a department of The Wesleyan Church Corporation, Global Partners falls under their EIN.

*Global Partners is a department of The Wesleyan Church Corporation. Charitable gifts are deductible if given to and for the use of a qualified tax-exempt organization, to be used under its control and discretion to accomplish its exempt purposes. Donor and/or donation information is shared with the ministry recipient or project manager related to the gift.*



## Questions?



[give@gponline.org](mailto:give@gponline.org)



317-774-3944



[www.gponline.org](http://www.gponline.org)

## Gift Designation Options

- Global Giving Fund
- Year End Campaign
- Team Amplify
- A specific missionary
- A specific project
- NEXT Scholarship Fund



**GLOBAL  
PARTNERS**