



## Using a Security Gift to Build God's Kingdom

**If you are transferring a stock electronically, please provide the following information to your broker:**

Merrill Lynch 100 Pine Street New York, NY 10270 (800) 999-1185 Attn: Security	Account # = Please call the Gift Processor at 888-689-6300 Account name = The Orchard Foundation Gift Account DTC # = 5198 EIN for The Orchard Foundation = 84-1466105
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**If you are transferring a mutual fund electronically, please instruct your broker to call @ WY A 7 cb \_]b at Merrill Lynch ft % L\* , &l) ) + and ask for the mutual fund's house number at Merrill Lynch.**

**If the securities you wish to donate were received as a result of an Employee Stock Purchase Plan (ESPP), Employee Stock Ownership Plan (ESOP) or an Employee Stock Option (ESO), we highly recommend you consult with your tax advisor and your employer before donating the shares as there may be additional tax implications.**

**You may be required to file Form 8283 along with your tax return to properly report the security gift. Please consult with your tax advisor.**

If the security is for an annuity or a charitable remainder trust, please provide the following information from your broker:

1. Date of acquisition:
2. Cost basis:

*Please provide the applicable section of your most current statement. Additional information may be required to establish accurate basis.*

The Orchard Foundation must have the following information to facilitate the processing of the gift when it is received into our Merrill Lynch account. Send the completed form by mail, fax or email (contact information is at the bottom of the second sheet).

1. Owner(s) of the security(ies):

Address:

Phone number:

Email address:

2. Do you wish to remain anonymous?

3. Name of the security(ies):

Number of shares:

Approximate value:

4. Is this gift a result of contact with any of our C&MA team or a church presentation? Other?

Please specify:

5. Who is the beneficiary of the security gift? (See the next page for explanations.)

Great Commission Fund (GCF):

Amount or % of Gift: \_\_\_\_\_

Missionary Support: Name(s): \_\_\_\_\_

Amount or % of Gift: \_\_\_\_\_

Approved Specials: Name(s): \_\_\_\_\_

Amount or % of Gift: \_\_\_\_\_

Outfit Specials: Name(s): \_\_\_\_\_

Amount or % of Gift: \_\_\_\_\_

Work Specials: Missionary Name(s): \_\_\_\_\_

Amount or % of Gift: \_\_\_\_\_

Local Church: Name \_\_\_\_\_

Amount or % of Gift: \_\_\_\_\_

## Other Opportunities

- Compassion and Mercy Associates (CAMA):*  
Amount or % of Gift: \_\_\_\_\_
- Donor Advised Fund (DAF):*  
Amount or % of Gift: \_\_\_\_\_
- Charitable Gift Annuity (CGA):*  
Amount or % of Gift: \_\_\_\_\_
- Other: (for more than 1 organization, please attach an additional page with the following information)*  
Name of Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
Contact: \_\_\_\_\_  
Phone/Email: \_\_\_\_\_  
Amount or % of Gift: \_\_\_\_\_

## Giving Options

**Great Commission Fund (GCF):** This is the main funding source for the C&MA's missionary work around the world. Contributions are used for ministry efforts in the United States and around the world, including missionary support, radio, medical, gospel translation, and church-planting.

**Missionary Support:** Contributions are placed in the GCF to help pay missionary allowances but are not sent to the missionary over and above his/her budgeted allowance. The missionary is informed of the gift and the giver. Sample description: "Support [Missionary Name]."

**Approved Specials:** Contributions are used for projects, such as the purchase of a missionary's vehicle. The Approved Specials list includes many projects, is updated monthly, and may be obtained from the website at <http://www.cmalliance.org/give/worker>. Use the exact description on the Approved Specials list when sending a contribution.

**Outfit Specials:** Contributions are used for a missionary's outfit including such items as stoves, refrigerators, computers, etc. *Donations to this special are taxable to the missionary.* Sample description: "Outfit [Missionary Name]."

**Work Specials:** Contributions are sent to the field to be used for the ministry projects of the missionary named, under the direction of the field leadership team. Sample description: "Work [Missionary Name]."

**Compassion and Mercy Associates:** CAMA provides a variety of relief and development ministries that flesh out the good news of God's love for people—body and soul. This is accomplished through compassionate servants ministering to people in crisis situations through word and deed. Specific projects may be obtained from their website at <http://www.camaservices.org/priority>. Sample description: "CAMA [Project Name]."

**Donor Advised Fund (DAF):** A donor advised fund is a charitable giving tool administered by The Orchard Foundation and created for the purpose of managing charitable donations on behalf of an organization, family or individual. A donor advised fund offers the opportunity to create an easy-to-establish, low cost, flexible vehicle for charitable giving as an alternative to direct giving or creating a private foundation. The initial amount to fund a DAF is \$10,000. For additional information, contact The Orchard Foundation (888-689-6300).

**Charitable Gift Annuity (CGA):** A charitable gift annuity provides regular income payments for life. Payments can begin immediately or be deferred to a later date. Upon death, The Orchard Foundation passes the remaining value of the asset to the charity. A current income tax deduction is available, and the payments may be partially tax-free. The minimum amount to fund a CGA is \$10,000. For additional information, contact The Orchard Foundation (888-689-6300).

*Please note that for trailing dividends under \$5, the amount will be gifted to The Orchard Foundation in order to minimize processing costs.*

Thank you! This will help us in receipting you, the donor, and in tracking the gift in our Merrill Lynch account.

**The Orchard Foundation**  
**Attention: Security Gift Processor**  
**8595 Explorer Drive**  
**Colorado Springs, CO 80920**

**Phone (toll free): 888-689-6300**  
**Fax: 719-268-7256**  
**Email: [steward@theorchard.org](mailto:steward@theorchard.org)**