



## Steps for Gifting Appreciated Stock

Thank you for considering a gift of stock to Alamance Christian School. Donating appreciated securities is a tax-smart way to support our mission while maximizing your impact on our students. Please follow these three simple steps to complete your gift:

### Step 1: Contact the ACS Business Office

To ensure your gift is received and acknowledged correctly, please contact our office to confirm your gift details.

- **Contact:** Dr. Joel Medley, Director of Advancement, 336-578-0318 or [jmedley@alamancechristianschool.org](mailto:jmedley@alamancechristianschool.org)
- **Information Needed:**
  - The name of the specific securities to be gifted.
  - The approximate number of shares or the target dollar amount.
  - The name of your delivering brokerage firm.
  - The intended purpose of the gift (e.g., The Warrior Fund, a specific project, Legacy Partner program, etc.).

### Step 2: Instruct Your Investment Advisor

Provide your advisor with the same details listed in Step 1. To ensure a seamless transfer, ask your advisor to contact our financial representative for exact delivery instructions:

- **ACS Financial Representative:** Paul Burns, Edward Jones
- **Contact Info:** 336-437-0218 or [paul.burns@edwardjones.com](mailto:paul.burns@edwardjones.com)
- **Action:** Coordinate a specific date for the transfer and request a confirmation once the transaction is complete.

### Step 3: Celebrate Your Impact

Once the transfer is finalized, Alamance Christian School will apply your gift to its designated area. We will provide you with a formal gift receipt for your tax records and celebrate with you as we see your investment lead to a **World Transformed for Christ**.

