



## The Point Investment Fund

We have established The Point Investment Fund to help us build a stronger foundation for pointing people to Jesus long into the future. The Point Investment Fund will be used to invest in and acquire Kingdom assets, which will increase in value over time and make a Kingdom impact for generations. We recommend giving to the Investment Fund for non-cash gifts such as stocks, bonds, inheritance, wills, trusts and gifts as prompted by the Holy Spirit.

## Types of Giving

### **Planned Gifts - Giving retirement assets, bequests, trusts, and etc.**

There are several types of gifts that may fall under this category, many of which are very simple to make. These include:

**Life Insurance:** you can simply name The Point Church of the Triangle as a beneficiary

**Retirement Assets:** you can name The Point Church of the Triangle as a beneficiary of your IRA, 401(k) or other qualified retirement plans. Any amounts remaining in your plan, free of income and estate tax, will transfer to The Point Church of the Triangle.

**Bequests:** you can name The Point Church of the Triangle in your will as a beneficiary, and your estate will receive an income tax deduction for the value of your bequest. A bequest written in a will can be made for either a percentage or a specific amount.

If you are interested in giving these types of planned gifts, please contact The Point Church Operations Director at [shannonh@pointchurch.com](mailto:shannonh@pointchurch.com)



## **Marketable Securities - Transfer ownership of stocks, bonds or mutual fund shares**

You receive an immediate income tax deduction for the full fair market value of the securities you transfer. In addition, you pay no capital gains tax on the difference between your cost and the fair market value .

***There are 2 steps needed to give marketable securities to The Point Church:***

### **Step 1: Initiate the Transfer**

You or your broker may electronically initiate the transfer of shares to The Point Church brokerage account. Use the following information to deliver your securities:

#### **Wells Fargo Advisors**

**Account Name: The Point Church of the Triangle**

**Account No.: 5634-7757**

**DTC Number: 0141**

### **Step 2: Notify The Point Church of transfer**

To ensure your contributions are attributed to the correct fund and campus, notifying us of this information will help us serve you better. Please provide the following information by email, mail, phone, or fax:

- Donor's full name and address
- Name and number of securities transferred
- Date of transfer
- Name of fund and campus that the securities will be designated.  
**(i.e. Cary or Apex General Budget or The Point Investment Fund)**

The Point Church

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