Make a gift with appreciated stock

Donating stock to St. Peter The Rock Media (dba AM 1260 The Rock) provides the donor the enjoyment of tax benefits while investing in the mission of St. Peter the Rock Media. In addition to the charitable deduction, donors who make their gifts through direct transfer of stock may avoid capital gains taxes.

When donating stock or other marketable securities, please initiate the transfer as described below, before selling it. By doing so, you may be able to claim a charitable contribution in the amount of the value of the security on the day of transfer to St. Peter the Rock Media.

You should consult your tax professional to discuss your personal situation. Note: Only stock which has appreciated in value should be contributed directly to St. Peter the Rock Media. If you are considering stock whose current selling price is below the purchase price, it may be advantageous for tax purposes to sell the stock first and then contribute the proceeds after receiving the cash settlement. This may entitle you to the capital loss on the sale as well as the charitable donation for the cash gift to St. Peter the Rock Media (dba AM 1260 The Rock).

Securities Gifting Instructions

If your shares of stock (or other securities) are being held in a brokerage account, they can generally be transferred electronically from your account to the St. Peter The Rock Media account at Northwestern Mutual Investment Services. Your current broker (or holder of shares) will require the following information, and likely a written request from you in order to process.

Northwestern Mutual Investment Services (NMIS)
St. Peter the Rock Media, Account # RB1-139739
DTC# 0443 (Pershing LLC)

Confirm your broker's requirements, and provide us with a copy of your request. Notifying St. Peter the Rock Media will ensure that your gift will be processed expediently.

If you have stock certificates in your possession, please contact Northwestern Mutual, Brandee Wyzlic at 614-222-6028 or brandee.wyzlic@nm.com for guidance on how to proceed.

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