



ST. ANDREW LUTHERAN CHURCH

INSTRUCTIONS FOR TRANSFERRING SECURITIES TO ST. ANDREW'S ACCOUNT AT CHARLES SCHWAB

1. To transfer securities (stock/bonds) from your brokerage firm to St. Andrew's Charles Schwab account, you must provide, in letter form, the **following information** to the brokerage firm from which the securities are being transferred. ***We cannot complete this for you.***
 1. The number of shares and name (description) of what is to be transferred (i.e. 120 shares of Intel Corp);
 2. The account number from which the security is being transferred;
 3. That the securities are to be transferred to the St. Andrew Lutheran Church account #8175-4769 at Charles Schwab;
 4. Reference the DTC number for Charles Schwab. It is 0164; Code 40
 5. State the purpose of the gift (i.e. Ministry and Mission, Building/Mortgage, etc.) including the amounts to each account.
 6. If the account from which the securities are being transferred is a joint account (more than one owner), then all owners must sign the letter of instruction;
2. **Please provide a copy of this completed form plus all related correspondence to the Financial Secretary of St. Andrew Lutheran Church at the beginning of this process (see other side).**
Temporarily use email address tammychef15@gmail.com or mail a copy to the church office marked "confidential for Financial Secretary."
3. **Allow enough time for the transfer to be completed by December 31 in order for the stock donation to be counted for the current tax year.**

Revised 11-2022



ST. ANDREW LUTHERAN CHURCH

STOCK DONATION FORM

1. Please submit your request to the firm holding the securities to be transferred (see other side for instructions).

Name of firm holding the securities to be transferred.

Address of firm holding the securities to be transferred.

Your Name _____ Envelope No. _____

Address _____

Telephone Number _____

Email Address _____

2. Please provide copies to: Financial Secretary, St. Andrew Lutheran Church

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Instructions to initiate an electronic transfer of securities.

Account Number of firm holding securities (your broker) _____

St. Andrew's account number - Charles Schwab 8175-4769

Charles Schwab DTC Number 0164; Code 40

Name of Securities _____

Number of Shares to be transferred _____

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3. Please state how St. Andrew is to use your donation, by amount:

Ministry and Mission Funding Plan _____

Building/Mortgage Fund _____

Designated Funds (Name Fund) _____

Property Improvement Proj. _____

Memorial Fund (Specify) _____

St. Andrew Foundation _____

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4. Your Signature(s) _____

Date _____

**Thank you very much for your contributions in support of the mission and ministry of
St. Andrew Lutheran Church**

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