



# 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).**

**\*\*\*Please use confidential email address:**

**financial\_secretary@standrewlutheran.com or mail a copy to the church office marked "confidential" for us.\*\*\***

**3. Allow enough time for the transfer to be completed by Dec. 31<sup>st</sup> in order for the stock donation to be counted for the current tax year.**

Revised 11-2023

12405 S.W. Butner Road, Beaverton, Oregon 97005-9864  
Telephone: 503.646.0629 - Fax: 503.627.0237  
email: [office@standrewlutheran.com](mailto:office@standrewlutheran.com) - Website: [www.standrewlutheran.com](http://www.standrewlutheran.com)



# 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

.....  
**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 \_\_\_\_\_

.....  
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 \_\_\_\_\_

.....  
4. Your Signature(s) \_\_\_\_\_

Date \_\_\_\_\_

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

5. 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.

\*\*\*Please use confidential email address:

**financial\_secretary@standrewlutheran.com or mail a copy to the church office  
marked "confidential" for us.\*\*\***

Revised 11-2023