

Instructions for Transferring Stock to Grace Episcopal Church or making a Transfer from an IRA or similar account

AT THE TIME YOU TRANSFER THE STOCK OR SECURITIES, YOU MUST NOTIFY THE GRACE TREASURER AT treasurer@gracehere.org with the information requested below in order to have your gift credited to Grace.

TRANSFER OF STOCK OR SECURITIES

If you would like to transfer stock or securities to Grace Episcopal Church for any reason, please follow these instructions:

1. Your broker or investment firm should transfer the stock to Grace's account at Wells Fargo. Your broker will want the following information:

Grace's Wells Trade Account Number: 4730-2680 Wells DTC #: 0141
Grace Tax ID: 27-3758292.

2. When you ask your broker to transfer the stock, please notify the Grace Treasurer at treasurer@gracehere.org. Please include the following information:

1. The name and number of units of the securities being transferred
2. Your name
3. The reason you are transferring the stock (examples: to pay my pledge, to make a gift in memory of A, etc.)

This information is essential because the transferring broker does not tell Grace the name of the donor. We want to make sure we credit you with the transfer.

3. It is Grace's policy to sell any securities transferred to Grace as soon as possible. Once the Treasurer receives notification of the transfer, the stock will be sold and the donor will be credited with the net proceeds. The Treasurer will then notify the donor and the amount is credited on Grace's books. If you have questions about your tax deduction for the donation of securities, you should consult your tax advisor.

TRANSFER FROM AN IRA OR BANK ACCOUNT

If you or your financial institution is sending a check from an IRA to Grace, please notify the Grace Treasurer at treasurer@gracehere.org that the check will be coming and the reason the check is being sent. The financial institution often does not tell Grace the name of the donor or the reason it is being sent. Once the check is received, the Treasurer will notify the donor and the amount will be credited on Grace's books.

If you have any other question, please feel free to contact our Treasurer at any time at treasurer@gracehere.org