

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 OUR TREASURER, TERRY JONES AT treasurer@gracehere.org with the information requested below in order to have your gift credited to Grace.

If you would like to make a transfer of 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 probably want the following information:

Grace's Wells Trade Account Number: 4730-2680 Wells DTC

#: 0141

Grace Tax ID: 27-3758292.

- (2) At the same time you ask your broker to transfer the stock, please notify the Grace Treasurer, Terry Jones, treasurer@gracehere.org that the stock is being transferred. Please include the following information:

- a. The name and number of units of the securities being transferred
- b. The name of the transferring broker
- c. 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 for because the transferring broker often does not tell Grace who the donor of the stock is and it may take a long time to track it down. 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 bookkeeper so that 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.

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