

DONATIONS OF STOCK OR MUTUAL FUNDS

Redeemer's account is held at - Morgan Stanley

Contact - Client Advisory Center
888-454-0555

Account # - 574-635138

There are three steps to transfer stock or mutual funds:

1. Give your broker instructions to transfer # shares of X Company by wire via DTC 0015 for credit to the account: "Evangelical Lutheran Church of the Redeemer," Account # 574-635138
2. The stock gift will be transferred to the church account within 5-7 business days.
3. Your broker can advise you with instructions for signing the actual stock certificate. Confirm with them to sign the certificate exactly as your name(s) appear(s) on the title and assign to "Evangelical Lutheran Church of the Redeemer."

Note: Some mutual fund companies will not transfer shares to a broker, but require that the Church establish an account with them. Ask the fund to mail or fax (703-562-7968) the application form to us, Attention Financial Coordinator. We've found that if you submit your request to transfer shares along with our account application and our request for disposition of the account in one package, it simplifies and speeds the process.

IMPORTANT! In all cases, please first contact Redeemer's Financial Coordinator of your donation, using an 'Advice of Donation' form available at the Church, online: www.redeemermclean.org, by phone 703-356-3346 or via email to sara@redeemermclean.org.

Please provide date, stock description, and designation (e.g. Operating Fund Pledge, Debt Reduction, etc). This helps us track receipts and ensures that your gift is properly allocated and reflected in your next statement. We will acknowledge receipt of the donation by mail.

Please note! By IRS rules, the transfer for tax deduction purposes does **not** occur **until** title is transferred and reflected in our account. This determination is made by the broker. Simply ordering the transfer, mailing the certificates or delivering the certificates to the Church does not constitute a transfer.