

Stock donation procedures for Trinity Presbyterian Church:

Thank you for considering a stock donation to Trinity. Below are the instructions for completing a gift of stock:

If you hold the Stocks in your brokerage account:

Shares held in your brokerage account, can be directly transferred to Trinity. Instruct your broker to transfer the shares to the Trinity Presbyterian Church account at Charles Schwab & Co., Inc. You will need to give them the following information-

- 1) DTC number: **0164, code 40**, and
- 2) the account number, which is **9082-3630**.

Once you have given your broker/advisor instructions, send an email to Francine Miltenberger, Trinity's Treasurer (f.miltenberger@comcast.net) notifying Trinity that a gift of X shares of Y stock has been made by you.

If you hold the stock certificate:

Sign your name on the back of the certificate exactly as it is spelled on the face of the certificate. (If the certificate is held jointly, both security holders must endorse the certificate.)

You'll find on the back of the certificate the following text: "*....do hereby irrevocably constitute and appoint _____ Attorney to transfer....*" In the blank, write "**Charles Schwab & Co., Inc.**" (the stockbroker for Trinity.) Your security certificate is now negotiable only by Schwab. Everything else on the certificate should be left blank.

Please enclose the certificate with a letter to Francine Miltenberger, Treasurer Trinity Presbyterian Church, stating that you wish to donate X number of shares of Y Corporation to Trinity (for example 50 shares of Microsoft). The address is:

Ms. Francine Miltenberger
Treasurer
Trinity Presbyterian Church
1106 Alameda de las Pulgas
San Carlos, CA 94070

Confirmation of the Gift:

After the shares have been transferred, we will send you a confirmation letter which will include all the information your tax preparer will need to include this donation in your tax return. We will assume that the proceeds are to be used for the Unified Budget unless you state otherwise in your correspondence.

If you have any questions regarding stock donation, please call Dave McClure at (650)867-7661 or Francine Miltenberger (650-209-5775).