

How to Make Gifts of Securities to St. John the Divine Episcopal Church

If you are considering gifting securities (including stocks, bonds and shares of mutual funds) to St. John the Divine in payment of an annual or specific fund pledge (i.e. building, general, etc.), please read the information below.

It is very important to contact David Yaeger at the church at (262) 308-7942, or email David at dyaeger@wi.rr.com and advise him of:

- Your name
- The name of the security donated
- The number of shares donated
- The date of transfer
- How the donation should be credited (building fund, general fund, etc.)

Without this information, the church will not be able to identify the transaction, acknowledge the gift, and properly apply it to your account.

The church has a General Securities Account at Pershing, LLC/H. Beck, Inc. through Jack Eckola ([J Eckola & Associates](#)) that can receive shares transferred to St John the Divine for any fund destination or purpose.

If you currently hold shares of securities in a brokerage account, below are the specific instructions to give to your current broker in letter form to implement the transfer of shares:

- Your name(s) as it appears on your current account
- Your contact information
- Your social security number(s)
- The account number on your current account
- The name of the securities to be transferred
- The number of shares to be transferred
- Transfer to: Pershing, LLC
- Pershing DTC number: 0443
- f/b/o St John the Divine Episcopal Church, Burlington, WI 53105
- Church account number: (call Jack at 262-210-1595 for this number)
- Church TIN: (call Jack at 262-210-1595 for this number)
- Church phone number: (262) 763-7482
- By order of: Your Name(s)
- Your signature(s): All account owners must sign

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If securities are not currently held in a brokerage account, please note the following:

If you hold shares of stock purchased either directly from a particular company, or purchased through an employee stock purchase plan, or in rare instances hold physical stock certificates, the transfer of these shares involves a different process. Please call Jack Eckola at 262-210-1595 to assist you in that process.

Thank you for your generosity to St John the Divine Episcopal Church.

Jack Eckola Office: (262) 210-1595 Home: (262) 763-6971

Sample Letter of Instruction

To: Merrill Jones & Company
Attn: Current Advisor
123 Main Street
Anytown, WI 54321

From: Christian Donor
543 Oak Street
Mytown, WI 56789
(262) 555-1234
Christian@myemail.com
My Account number: 1234-56-7890
My SSN: 123-45-6789

Date: December 8, 20xx

Re: Stock Transfer

Dear Merrill Jones & Company Advisor:

I wish to gift to St John the Divine Episcopal Church, Burlington, WI _____ shares of _____ stock, with the symbol of _____, held in my account number _____ at your brokerage firm _____.

Please send these shares to Pershing, LLC, DTC# 0443, for further credit to account number (call Jack for this number) in the name of St John the Divine Episcopal Church, Burlington, WI, TIN (call Jack for this number). Church phone number is 262-763-7482.

Sincerely,

Donor signature(s) X _____ X _____