

## **Instructions to Your Broker or Trustee for Making a Stock Gift to the Church**

You have several options when making a gift of stocks or bonds to the Church.

1. The fastest and easiest way to transfer stock to the Church is to call your Financial Advisor or Broker and tell them what stock or bond and how much you want to transfer. The broker will ask you for the transfer instructions. **(Edward Jones DTC# 0057, F/A/O First Presbyterian Church of Mount Dora, Florida, Account #322-24750-1-8)**. The broker should mail or fax you a form to sign and return.
  
2. You may use the attached form letter to convey your instructions to your broker or trustee to transmit a gift of stock to the church. Simply type or write by hand your instructions on the form letter. Specific instructions in sequential order follow:
  - ❖ Date - enter today's date
  - ❖ From - enter your name and address
  - ❖ To – enter the name and address of your broker or trustee
  - ❖ Account Name – enter the name of your account
  - ❖ Account Number – enter the number of your account from which the gift is to be made
  - ❖ Dear – enter your greeting
  - ❖ Shares & Description – enter the number of shares and stock name(s) you intend to give
  - ❖ Contact me by phone at – enter your telephone number
  - ❖ Yours Very Truly – sign the letter
  - ❖ Send the original letter to your broker or trustee
  - ❖ Send copy of letter to the church Treasurer and note how funds are to be allocated
  
3. If you prefer, you may create your own letter, which includes all of the above information. In your letter, be certain that the following is copied exactly as shown below:

**Please effect a DTC transfer of the above referenced security(ies) / shares to  
Edward Jones DTC# 0057, F/A/O First Presbyterian Church of Mount Dora,  
Florida, Account #322-24750-1-8**

**IMPORTANT NOTE:** Generally, if the stock you plan to give to the church has appreciated in value (your cost basis is less than the current value), there may be tax benefits if you gift the stock directly to the church, rather than selling it and gifting the proceeds. On the other hand, if your stock has decreased in value (cost basis is greater than the current value) it may be better for you to sell the stock and give the proceeds to the church. **Please consult your tax advisor for specific advice.**

**Date:** \_\_\_\_\_

**From:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**To:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**RE: Charitable Contribution from Account:**

Account Name: \_\_\_\_\_  
Account Number: \_\_\_\_\_

Dear \_\_\_\_\_:

I wish to make a charitable contribution of the following stock(s)/bond(s) to the First Presbyterian Church of Mount Dora:

Shares	Description
_____	_____
_____	_____
_____	_____

**Please effect a DTC transfer of the above referenced security(ies) / shares to Edward Jones DTC# 0057, F/A/O First Presbyterian Church of Mount Dora, Florida, Account #322-24750-1-8**

Please execute this instruction promptly. If there are any questions regarding this letter, please contact me by phone at \_\_\_\_\_

Yours Very Truly,

\_\_\_\_\_

Copy: Treasurer, First Presbyterian Church of Mount Dora