

Stock Transfer Contribution and Authorization Form



Thank you for your interest in contributing securities to Saint Thomas' Episcopal. Please use this form to deliver transfer instructions to your broker. When you are ready to transfer your gift, submit this original signed document to your broker and send a copy back to our advancement office at promise@stes.org.

1. Donor Information

To expedite the handling of your gift, please print clearly.

Name:
Home Address:
City, State, Zip:
Preferred Phone:
Preferred Email:

2. Securities to Transfer

Security Name:
Number of Shares:
Estimated Value:
Security Name:
Number of Shares:
Estimated Value:
Security Name:
Number of Shares:
Estimated Value:
Security Name:
Number of Shares:
Estimated Value:
Security Name:
Number of Shares:
Estimated Value:

3. Broker Information

Name:
Business Phone:

4. Transfer Authorization

I/we, _____, hereby
authorize on this _____ day of _____ 20 _____,
my/our broker at _____
to transfer from my account number

Wells Fargo, DTC No. 0141
F/C St. Thomas' Episcopal Church
Acct No. 2176-6560
Contact: Kathy Thompson, 281.476.9965

Note: For tax receipt purposes, actual stock valuation is based on the mean of the highest and lowest price on the day the stock is received by Saint Thomas' Episcopal. Gifts of stock will be liquidated when received, and brokerage fees will be deducted from the gross proceeds and your campaign gift will be credited with the net value after brokerage fees.

Sign Here (signature required)

Signature

Date

Questions, comments or submit form?

Advancement Office, Saint Thomas' Episcopal
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Web: STES.org
Email: promise@stes.org