

## **TRANSFERRING STOCK TO ALL SOULS**

Thank you for your gift of stock to All Souls Church. These gifts help us address our mission and ensure the financial security of our church community.

This document gives you the specific steps to make this transfer. Once the stock is received by our broker, it will be sold immediately and you will get credit for a donation in the amount of the resulting sale. We will send you an acknowledgment for the donation amount, which can be used as a charitable donation toward your taxes.

The shares that you want to donate are either held by your broker, and can be delivered to us electronically, or are actual certificates held in your possession. If a broker holds them, please follow the instructions in step 1.A. If you hold the certificates, please follow step 1.B. In either case please also follow step 2. (The attached Irrevocable Stock Power form is only used to transfer stock for which you physically hold the paper certificates – see further information below).

### **1.A. Electronic transfer of shares**

In many cases, the shares will be held by your broker in "street name," and you will want to arrange a electronic transfer (also known as a "wire" or "DTC" transfer) of those shares. Your broker will then transfer ownership of those shares to All Souls via an electronic transfer system. The detailed wire-transfer instructions (i.e., the DTC address) are available from the church administrator.

Note that mutual fund shares cannot be transferred in this way. Please contact the church Administrator to arrange mutual fund share transfers.

### **1.B. Physical transfer of stock certificates**

In some cases, you will be in physical possession of the share certificates. In this case, we will need to deliver the certificates to the Merrill Lynch office.

To do this, you may endorse the certificates by placing your signature in the "Transfer Form" on the reverse side of each certificate. Then deliver the certificates to the church Treasurer or Administrator, along with a written indication of your intent (for example, to pay your annual pledge, or to make a gift to a specific endowment fund, or to the unrestricted general endowment).

Alternatively, if you do not feel comfortable endorsing the certificates, or if you have many individual certificates, you may instead submit the Irrevocable Stock Power form (see below). In this case, do *not* sign or write on the certificates themselves. Instead, sign the form, having your signature notarized. Do *not* complete any other blanks on the form.

If you are mailing the certificates, it is important that you *not*, mail the Stock Power form and certificates in the same envelope. Mail them separately, using certified mail, "return-receipt requested." If you hand-deliver them to the church, *please* deliver the certificates in person to the Treasurer or Administrator – that is, do *not* leave them anonymously in someone's mail slot.

## **2. Notify the administrator**

**Important!** Regardless of how you deliver the shares, *please* notify the church Administrator in advance of what you are doing. This allows the Administrator to arrange for an immediate sale of the shares, so that you get full credit for the value of shares transferred. Otherwise the value of your donation (which is based on the date-of-sale valuation) could differ from the value at the time the shares were transferred.

**All Souls Church, Unitarian  
 1500 Harvard St., NW  
 Washington, DC 20009  
 202-332-5266**

**DONATION OF SECURITIES**

**Donor Information**

Name(s) to credit	Date
Address	
City, State, Zip	Phone

**Securities to be Transferred**

<b>Date to be transferred</b>	<b>Num. shares</b>	<b>Issuer or Company</b>	<b>Approximate value (\$)</b>
			Total

**Notes, including the purpose of the donation (e.g., pledge)**


**Instructions**

- Please complete as much information as is available – this will help us correctly identify your donation.
- Please deliver this form to the church administrator when completed..
- Wire transfer instructions are available from the church administrator.
- If delivering paper certificates, you may use the attached Irrevocable Stock Power form to transfer ownership.
- **THANK YOU!**

**IRREVOCABLE STOCK POWER**

FOR VALUE RECEIVED, *the undersigned does (do) hereby sell, assign and transfer unto*

**All Souls Church, Unitarian** (Tax ID # 53-0196567), \_\_\_\_\_ *shares of the*

\_\_\_\_\_ *Capital Stock of* \_\_\_\_\_

*standing in my (our) name(s) on the books of said Corporation represented by*

*Certificate(s) No(s)* \_\_\_\_\_

*herewith, and do hereby irrevocably constitute and appoint*

\_\_\_\_\_ *attorney to transfer the said stock on the*

*books of said Corporation with full power of substitution in the premises.*

*Dated* \_\_\_\_\_

X \_\_\_\_\_  
Person(s) executing this power signs here

X \_\_\_\_\_  
Person(s) executing this power signs here

*In presence of*

\_\_\_\_\_  
Witness

IMPORTANT: The signature(s) to this Power must correspond with the name(s) as written upon the face of the certificate(s) in every particular without alteration or enlargement or any change whatever.