



Gifts of Stocks & Bonds to St. Pauls United Church of Christ - Capital Campaign

You can donate stocks or bonds to St. Pauls UCC! This can be done to satisfy your annual giving commitment, to contribute to a capital campaign or for any other form of giving to St. Pauls. Most mutual funds can also be gifted to St. Pauls (please contact the church bookkeeper, Melissa Miller Furgeson, at bookkeeper@spucc.org to confirm your specific mutual fund is eligible – include the name of the fund and the symbol in your correspondence).

When you donate appreciated stocks, bonds and mutual funds instead of cash, the benefit the church receives exceeds the cost of the original securities purchased. You'll get a charitable deduction for the full amount of your gift and avoid the impact of the capital gains taxes on the appreciated securities.

Process

Gifts of securities to St. Pauls UCC are managed through United Church Funds (UCF), which is the institutional investment ministry of the United Church of Christ. Your broker will transfer your desired security shares to the UCF brokerage account. Our instructions to UCF are generally to liquidate the securities and deposit the resulting proceeds into St. Pauls investment account or bank account.

Prior to initiating the transfer with your broker, please send an email to the St. Pauls Accounting Office (bookkeeper@spucc.org) and our UCF account representative, Deborah Cho (deborah.cho@ucfunds.org) with the completed form on the next page.

Then, please share the completed form with your broker. The information they will need is in the bottom section, "TRANSFER INSTRUCTIONS FOR BROKER/ADVISOR."

Thank you for your generosity and support of St. Pauls!

2335 North Orchard Street, Chicago IL 60614

STOCK DONATION FORM

St. Pauls United Church of Christ of Chicago, Illinois, through our investment partner, United Church Funds (UCF), provides stock donation services. This service is provided free of charge to allow individual donors a secure and cost-effective opportunity to donate appreciated securities to support our church's mission and ministry. Most exchange-traded securities can be easily transferred directly from the donor's brokerage firm to UCF, the proceeds of which are then transferred to St. Pauls UCC.

Please fully complete the following form and send it to UCF via email at deborah.cho@ucfunds.org. UCF will not be able to process the stock donation without **ALL** the following information:

DONOR INFORMATION (optional if gift is anonymous):

Donor Name: _____ Address (St., City, State, Zip): _____

Email: _____ Phone: _____

DONATION INFORMATION (required):

Stock/Company Name to be Transferred/Ticker: _____ Approximate # of Shares: _____

Approximate Date of Transfer: _____ Approximate Dollar Value: _____

Donors can elect to direct their gift to either the Capital Campaign or Annual Fund. Please confirm where your gift will be directed: (Check One) Capital Campaign: 161101 Annual Fund Giving: 161100

BENEFICIARY CHURCH/ORGANIZATION:

Church/Organization Name: St. Pauls UCC, Chicago IL
City/State: Chicago, Illinois Contact Person: Melissa Miller Furgeson
Email: bookkeeper@spucc.org Phone: 773-348-3829

TRANSFER INSTRUCTIONS FOR BROKER/ADVISOR:

Please provide the following information to your advisor/broker for processing the stock/security transfer:

Transfer Security To:

BNYM/Pershing LLC

DTC: #0443 Account Number: N7M001442 Account Name: United Church Funds, Inc.

For Further Credit to: Church / Organization Name, City and State: St. Pauls CC, 2335 N. Orchard St. Chicago IL 60614

Please contact United Church Funds with any general questions by email at info@ucfunds.org or by phone at 877-806-4989. Thank you for the opportunity to be of service to your organization!

NOTE: UCF does not provide investment advice regarding tax, investment or other considerations for individual donors. We encourage you to speak with your current advisor or other professionals about your financial situation, goals and objectives.