



Gifts of stocks & bonds to Saint Pauls United Church of Christ

You can donate stocks or bonds to Saint 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 Saint Pauls. Most mutual funds can also be gifted to Saint 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 Saint 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 Saint Pauls' investment account or bank account.

Instructions for you

Prior to initiating the transfer with your broker, please send an email to the Saint Pauls Accounting Office (bookkeeper@spucc.org) with the following information:

- the cusip number, number of shares, and name of the security (you can get this from your broker)
- include your full name and mailing address (UCF will send you a confirmation letter by mail)
- the purpose of your donation so we can properly account for your contribution (for example, to fulfill your annual giving commitment, a capital campaign donation, an in memoriam gift, etc)

Instructions for your broker

Please share the following information with your broker in order to process the transfer of securities to Saint Pauls UCC:

- DTC# 0443
- Pershing, LLC
- For Credit to account #: N7M001442
- Client account name: United Church Funds
- in the 'for further credit' or 'memo' field, also put: Saint Pauls UCC, Chicago, IL



STOCK DONATION FORM

United Church Funds (UCF) provides stock donation services through our custodian bank, Bank of New York Mellon (BNYM). This service is provided free of charge to allow individual donors a secure and cost-effective opportunity to donate appreciated securities to their local church or preferred charitable organization. While UCF may not be able to provide these services for some securities, most exchange-traded stocks can be easily transferred directly from the donor's brokerage firm to UCF. Please fully complete the following form and send it to UCF via email at info@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: _____

BENEFICIARY CHURCH/ORGANIZATION (required):

Church/Organization Name: **St. Pauls United Church of Christ**

Church/Organization Account Number (to be credited with the stock proceeds): **161100**

City/State: **Chicago, IL** Contact Person: **Melissa Miller Furgeson**

Email: **bookkeeper@spucc.org** Phone: **773-517-8037**

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. Once you have elected your donation option with your advisors, please give the following information to your advisor/broker for processing the stock/security transfer:

TRANSFER INSTRUCTIONS FOR BROKER/ADVISOR:

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 UCC, Chicago, IL**

Please contact United Church Funds with 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!