

## Stock Transfers

Procedures for Gifting Stock to Immanuel Presbyterian Church--DTC INSTRUCTIONS for use with Immanuel's Charles Schwab account only. For all others, please contact the business office.

Individuals are welcome to transfer stock from investment accounts to Immanuel at any time. The following procedures will ensure that your gift is properly documented and accounted for:

### TRANSFER

1. You can gift stock via a DTC (Depository Trust Company) transfer into this account by providing written instructions to your current broker.

2. Your letter should read as follows and MUST include the information in italics:

*"This is my authorization to transfer from my account, account # xxx-xxxx, via DTC transfer, the following securities: 300 shares of XYZ. Please deliver these securities to DTC Clearing 0164, Code 40. These securities are being delivered for the account of Immanuel Presbyterian Church, account #4625-5120."*

3. Due to the nature of a DTC transfer, it is important that you inform the church that you have made this gift so you can receive proper tax credits. Please fax, mail or [email](#) the following information to the business office, attn: Mary Ann Vaughan:

- The name of the stock you are gifting,*
- The number of shares and approximate value,*
- The date your request was made,*
- Your name and phone number for daytime contact.*

Please email [mvaughan@ipcmclean.org](mailto:mvaughan@ipcmclean.org) or call her at (703) 356-2517 if you have any further questions about gifting stock. Thank you.