

Three Easy Steps to make a charitable gift of securities to the church.

- 1) **Contact your Broker.** They have a specific form (often called a 'partial transfer/gift form') you will need to complete in order to transfer the securities to the church.
- 2) **Provide your Broker with the information below.** This information is used to complete their form, and tells them where to send the securities.

- Receiving Brokerage Firm Name: BB&T Investments Services
- Receiving Brokerage Address: 200 S. College St., 8th Floor, Charlotte, NC 28202
- Receiving Brokerage DTC Number: 0702
- Receiving Brokerage Advisor: Ed Cwalina (610.882.5361) (see below)
[Broker Point of Contact is: Admin. Assistant: Cathy Schnabel (610.882.5362)]
- Receiving Account Registration: First Presbyterian Church of Allentown
- Receiving Account Number: 70815759
- Receiving Account EIN: 23-1352423
- Receiving Account Contact:
Larry Deal, Church Business Administrator
First Presbyterian Church of Allentown
3231 W. Tilghman Street, Allentown, PA 18104
Tel: 610.395.3781
Email: larry.deal@fpcallentown.org

- 3) **Notify the church of your gift.** (Notify Larry Deal at 610.395.3781)

THIS IS VERY IMPORTANT. We need to know the gift is coming in order to track receipt of the securities, and to give proper acknowledgement of the gift. Here is what we need to know:

- Your Name
- The name of your brokerage firm sending the securities
- The name of your financial advisor
- Your financial advisor's phone number
- The type of security being gifted (e.g. stock, bond, or mutual fund)
- The name of the security (e.g. IBM stock; Fidelity Growth Fund)
- How many shares, or units, of the security are being gifted
- Is your gift for the FPCA Endowment Fund, or your Annual Giving Pledge?

FYI – About 'Medallion Signature Guarantees' – Some brokerage firms require them to be added to their paperwork. Generally a 'Medallion Signature Guarantees' can be obtained from your local bank. Bringing in: 1.) A copy of your statement that shows ownership of the investments you are gifting to the church. 2.) Bring with you a photo I.D., and 3.) Sign the Gifting form in front of the individual who will apply the Medallion Signature Guarantee to the form.

If you have any questions, please contact Larry Deal at 610.395.3781, or email him at larry.deal@fpcallentown.org

THANK YOU FOR YOUR GENEROUS GIFT!