

Stock Gift Instructions

To transfer stock to Holy Cross Lutheran Church, take the following actions:

1. Tell your broker you want to transfer stock to your churches account at:

Charles Schwab & Co.
DTC #0164
fbo Holy Cross Lutheran Church
Account # 2069-6344

This would be if the stock is coming from another firm.

2. If the certificate is in the church members name:
 - a. It needs to be signed on the back or have a stock power attached to it and accompanied by a Letter of Instruction. It will need to be sent to us and then we will send it in.
3. If you are trying to transfer a mutual fund, a customer account transfer form must be filled out and on the front it specifically needs to state that it is a gift.
4. Complete the form below, and return to Sherry Pearce Meyer in the church office or via email at SherryMeyer@holycross-elca.org.

Name _____

Donation date _____

Name of stock _____

Number of shares _____

Approximate value \$_____