

Donations by Gifts of Stock

INSTRUCTIONS

The donor provides the following information to his or her broker.

St. Stephen's Episcopal Church brokerage representative: L. Banks Wannamaker, Senior Vice President
DTC Number: 0075
St. Stephen's LPL Financial #:2766-5983

Additional information:

Donor's name _____

Statement that the stock gift is to benefit St. Stephen's Episcopal Church

Purpose of the gift – St. Stephen's Episcopal Church Capital Campaign

1. The donor's broker must notify St. Stephen's Episcopal Church by contacting the Parish Administrator through email at 67anson@gmail.com.
2. Upon receipt of the stock transfer, LPL Financial will send a confirmation letter to St. Stephen's Episcopal Church. The letter will confirm the gift date and the high and low trading prices on the date of transfer. The gift value shall be recognized as the average of the high and low trading price, and the gift date is the date the transfer is credited to St Stephen's account.
3. The Donor shall receive an acknowledgment letter and receipt from St. Stephen's Episcopal Church, based on the information provided by LPL Financial, which shall include share prices used to value the gift.

If you have any questions, please contact the Parish Office at (843) 723-8818 or mmorgan@ststephenschs.com

