

## South Garland Baptist Church Stock Transfer Process

1. Please complete the form on page 2 and send it to your stockbroker. Before you send the form to your stockbroker, contact Michael Cole at the church, (gmichaelcole@yahoo.com) to inform him of your gift.
2. Please be sure to record the date of your gift, the number of shares, and the stock name on the form so all goes smoothly with the transfer.
3. At this point, your broker will have everything she/he needs to make the transfer to our stockbroker, Antonio Caufield (with Edward Jones 972-530-2466). You or your broker should also contact Julie Dixon (Edward Jones Office Administrator) to inform her of this transfer. Her contact information is included at the bottom of page 2.
4. Once Edward Jones receives the stock, they will sell the stock on the church's behalf. Stock transfers occurring near the end of the trading day may not be received and sold until the next business day.
5. Please ask your broker to note the value of your stock gift upon donation for your tax purposes by using the median value (high and low for the day divided by two) of the stock on the date of the gift.
6. The church will generate a stock gift acknowledgment letter. This letter will indicate the date of the stock gift and the number of shares given. The church will not value the stock gift in this acknowledgement. The stock value, as it was received by the church, will be included on quarterly and year-end records of giving. The church understands that this value may be different from the stock's tax accounting value and should not be used for tax purposes. Please consult your tax accountant/professional.

If you have any questions about this process, please contact the church, at 972-271-5428.

South Garland Baptist Church thanks you for your continued generous support of our work.

Date: \_\_\_\_\_

To: Broker's name/ firm/ address

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

RE: Account # \_\_\_\_\_

Please accept this as my/our letter of authorization to send through "DTC" (Depository Trust Company) the following security in my account as a donation to the **South Garland Baptist Church**.

\_\_\_\_\_ shares of \_\_\_\_\_

\_\_\_\_\_

donated on \_\_\_\_\_

for the purpose of \_\_\_\_\_

Please send to DTC #0057 in the name of "NF Clearing" for further credit to the **South Garland Baptist Church** (account # 791-22853), held at Edward Jones.

Sincerely,

X \_\_\_\_\_

X \_\_\_\_\_

(All account holders on this account must sign)

FOR DONOR BROKERS:

As electronic transfers are received without the donor's name attached, please notify **Julie Dixon**, [julie.dixon@edwardjones.com](mailto:julie.dixon@edwardjones.com) or 972-530-2466 (phone) or 866-530-2466 (fax)

AND

**Michael Cole**, [gmichaelcole@yahoo.com](mailto:gmichaelcole@yahoo.com) with the following:

the name of donor,  
number and type of stock,  
value of stock at time of gift