

SECURITIES TRANSFER PROCESS
TO
MOUNT OLIVET LUTHERAN CHURCH OF PLYMOUTH

Date: _____

Member Name: _____

Security/Mutual Fund Name: _____ # of Shares Transferred: _____

Pledge or Account to which the contribution should be credited:

GENERAL FUND _____ BEOPEN FUND _____ OTHER _____

Directions:

Mount Olivet currently has an account at Fidelity. Securities are sold as soon as possible after they are transferred to our account. Please contact your investment company and give them Mount Olivet's Fidelity account information to initiate the transfer. *Make sure that you give the account number so that they don't confuse us with the "other" Mount Olivet.*

Fidelity Investments

Account Name: MT OLIVET LUTHERAN CH OF PLY

Account Number: Z44-699934

DTC#: 0226

Customer Service: 800-544-6666

Once you've completed the transfer, please complete this form and return it to my attention at the church office (or send an email to gdenninger@moply.org with the same information). Your name is not on the information when the securities are transferred. Therefore, unless you tell us, we have no idea from whom the stock was donated.

The amount credited against your pledge will be the **actual dollar amount** we receive from the sale. For tax purposes, your gift will not be reported on your contribution statement (since your tax deduction is not what the church receives, but is the value of the stock at the time you made the transfer). You will receive a letter from the church listing the shares donated, which you should keep with a qualified appraisal or brokerage statement, stating the value of these shares at the time of your donation, as support for your tax deduction.

Please call me with any questions at the church office, 763-509-9401 or e-mail me at gdenninger@moply.org.

Thank you,

Gwen Denninger
Finance Administrator
763-509-9401
gdenninger@moply.org