

## STOCK DONATIONS TO CONCORD CHURCH

### I. Stock available as a certificate:

- A. Deliver stock certificate to Ron McKinney's attention in the Church Office in a sealed envelope. **Do not write anything on back of certificate.**
- B. Sign a stock power (available from the Church Office) with the signature of the certificate owner. **Do not put anything else on the stock power – just the signature.**
- C. Write a letter/email to Ron advising him of the donation (# of shares of xyz), and purpose of donation (\$ for pledge, \$ for Deacons' Fund, etc.). Sign and date letter.
- D. Put letter and stock power in separate sealed envelope for Ron.

### II. Stock to be transferred from donor's brokerage account to Concord's brokerage account at LPL Financial:

- A. Provide following instructions to donor's broker:
  - DTC#: 0075
  - Broker: LPL Financial
  - Account Name: Concord Presbyterian Church
  - Account #: 49024219
- B. Donor's broker will probably require written instructions with the information in (A) and the number of shares of xyz to be transferred to Concord.
- C. Provide Ron with copy of written instructions to broker plus separate letter to Ron (copy to Stan Lamar) as to use of the proceeds.

### III. **Very important: Do not request the broker to sell the stock. LPL Financial will notify Ron when stock has been received.**