



**4 Waldron Avenue
Summit NJ 07901**

DONATING STOCKS OR SECURITIES TO UCS

HELPING YOURSELF WHILE HELPING UCS

Thank you for your generous support of The Unitarian Church in Summit. We greatly appreciate receiving securities (stocks, shares, etf's, bonds or mutual funds). This document has details on how to make a donation of securities to the Church.

What can I donate?

At any time, you can donate securities to UCS. These donations can be used to fulfill an existing promised contribution or as a general gift to the Operating, Capital Campaign, Endowment or Long Term Major Expense Funds. Like cash or check donations, these security donations are usually tax deductible.

What do I have to do?

First, decide what you want to donate, and how much. If you want to donate securities, email Executive Director, Tuli Patel (tuli@ucsummit.org) and our bookkeeper Lou Rigamonti (accounting@ucsummit.org). Or if you prefer, call one of them at 908-273-3245.

Indicate the name of the security, the ticker symbol and number of shares you will be donating. Also tell Tuli or Lou the specific purpose of the donation and the approximate donation date. An example might be, "I am donating 3 Apple shares, ticker symbol AAPL, to be applied to my annual operating contribution for 2015 - 2016".

After the Church receives the donation, you will be credited with the fair market value as of the day the donation was received.

My securities are held with a broker. What do I do?

Contact the broker and indicate that you want to transfer securities to The Unitarian Church in Summit. The broker will initiate the transfer by directing you to complete a form or forms. If the securities are held jointly, be sure to have both owners execute the required forms.

The Unitarian Church in Summit has a brokerage account with Vanguard. If your broker is with Vanguard, tell him or her to do an "in house" transfer to the corresponding brokerage account shown below:

- **The Vanguard Group – account #14230326 / electronic transfer #DTC0062**

If your broker is with another company (TD Ameritrade, Fidelity, Franklin Templeton etc.), tell him or her that the securities are to be transferred to the Vanguard brokerage account as shown above.

My securities are held with a mutual fund company. What do I do?

Contact the mutual fund company and indicate that you want to transfer securities to The Unitarian Church in Summit. The mutual fund company will initiate the transfer by directing you to complete a form or forms. If the securities are held jointly, be sure to have both owners execute the required forms. Direct transfer of the securities to the Vanguard brokerage account as shown above.

I personally hold physical securities that I want to donate. What do I do?

Take the securities to the TD Ameritrade office at 788 Morris Turnpike, Short Hills or 22 North Park Place, Morristown. Indicate that you want to donate the securities to The Unitarian Church in Summit, **TD Ameritrade account # 881657187 / electronic transfer #DTC0188**. You will be instructed to sign over the securities in the appropriate way.

My securities are held by the company which issued them. What do I do?

Contact the company and indicate that you want to transfer securities to The Unitarian Church in Summit. The company will direct you how to proceed. If the securities are held jointly, be sure to have both owners execute the required forms. Direct transfer of the securities to the Vanguard brokerage account as shown above.

I'm all done. Now what?

Thank you for your support! Shortly after your securities donation is received by the Church, you will receive an acknowledgement with details about your donation. If there is an error, or anything is not as you might expect, please contact Tuli.

Thank you for your generous support.