



Grace
Lutheran

*building relationships
with God and community*

Procedures for Transfer of Gifts of Stock/Securities
(Effective January 2017)

- **DONOR:** Provide the original signed letter of authorization attached below to your Broker
- **NOTICE TO BROKER:** Please fax a copy of this letter to the following individuals:

- 1) Mimi Boblitz, Passive Capital Management
Phone 443-275-2703, Fax 443-275-2955
- 2) Bill Comegna, Treasurer
Phone 410-746-9505(Cell), Church Fax 410-848-2113
Email: bill.comegna@gmail.com Copy: aprocario@gracelc.org (bookkeeper)

DATE: _____

TO: _____
Broker/Financial Advisor (include phone number)

FROM: _____
Donor Name

Donor Account Number

I am writing to request the transfer of a gift of _____ number of shares of
_____ Securities to:

Charles Schwab & Co., Inc.
DTC Clearing Number 0164- Code 40
For Account Name: Grace Lutheran Evangelical Church.
Account Number: 3066-2815

Signature of Donor