

**St. Paul's Episcopal Church
2747 Fairmount Blvd.
Cleveland Heights, OH 44106**

Steps for Completing Gifts of Stock

If the stock is in a brokerage or trust account:

Instruct your stockholder in writing to have the gifted stock transferred to the St. Paul's Episcopal Church account with the brokerage firm listed below:

Fidelity Investments (DTC Number **#0226**)
100 Crosby Pkwy, Mailzone CK1B
Covington, KY 41015-1991

St. Paul's Episcopal Church Tax ID # **34-0714744**
St. Paul's Fidelity Account Number - **#649-825379**

When directing your stockbroker to make a gift to the church, you must include the Fidelity DTC number, as well as St. Paul's account number. If you make a transfer between brokerage firms, the donor's name may be omitted from the transfer information because of the privacy act. As a result, the receiving brokerage company may not be able to determine the donor's name. Therefore, if you make a stock gift, please notify St. Paul's Director of Operations, Pam O'Halloran (pohalloran@stpauls-church.org / 216-932-5815) or Brenda Burton, controller (bburton@stpauls-church.org) that you are making a transfer.

You will receive an acknowledgement letter for the gift detailing the number of shares, the date of the transfer, and the estimated value of the gift.

If the stock is in the form of a stock certificate in your name:

For Transfer of Actual Certificates by Mail:

- Mail the actual certificate by registered mail, requesting a signature as proof of delivery
- In a separate envelope, also by registered mail, mail a signed stock power of authority, to transfer ownership of the stock to St. Paul's Episcopal Church. Include a signed, guaranteed gift letter stating the number of shares, the stock issuer and the date of the gift.