

## AUTHORIZATION OF STOCK TRANSFER

To the Episcopal Church of St. Mary the Virgin, San Francisco, CA Please use this form to instruct your broker to transfer securities or stock to the Episcopal Church of St. Mary the Virgin and to inform the church or your gift.

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Name of your broker)

\_\_\_\_\_  
(Name of your brokerage or bank)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City, State, Zip Code)

(\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
(Telephone #)

\_\_\_\_\_  
(e-mail address)

\_\_\_\_\_  
Stock Gift Donor's Name (Date of Birth)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City, State, Zip Code)

(\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
(Telephone #)

\_\_\_\_\_  
(e-mail address)

This form authorizes the transfer of \_\_\_\_\_ shares of

\_\_\_\_\_  
from my account # \_\_\_\_\_ to the Episcopal Church of St. Mary the Virgin via their brokerage account at State Street Bank.

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Please Print)

\_\_\_\_\_  
(Please Print)

## AUTHORIZATION OF STOCK TRANSFER

**1. Electronic Transfer:** If securities are registered in book form/street name at a broker, give the following transfer instructions to your broker:

Send to the account of:

DTC Participant #987  
Charitable Asset Management  
State Street Financial Center  
One Iron Street, 6<sup>th</sup> Floor  
Boston, MA 02110  
For a/c # 52-041084  
Account name: The Episcopal Church of Saint Mary the Virgin  
San Francisco, CA 94123

**2. Physical Stock Transfer:** If securities are held as physical certificates in your name, send the stock certificates along with a transmittal letter to the following address:

Attn: Scott Regan  
Charitable Asset Management  
State Street Financial Center  
One Iron Street, 6<sup>th</sup> Floor  
Boston, MA 02110

You should sign the backside of the stock certificate or sign an irrevocable stock power form. By signing the stock certificate or the stock power form, the Episcopal Church of St. Mary the Virgin takes ownership of the stock. You can send the certificate and the stock power form separately for security if desired.

Your gift date will be the date the stock is received into the account of the Episcopal Church of St. Mary the Virgin. You will receive an acknowledgment from the church noting the amount received. The gift will be valued at the average price on the day it was transferred to the church's account. Please contact your tax advisor regarding valuation for income tax purposes.

Please prepare three copies of this form: one for your broker, one to give to the church, and one for your files. It is very important that you notify the church of the gift and as to how to apply your gift.

The purpose of this gift is: (indicate approximate value or percentage)

\$ \_\_\_\_\_ % (1) Annual Pledge (for year of \_\_\_\_\_)

\$ \_\_\_\_\_ % (2) Endowment Fund

\$ \_\_\_\_\_ % (3) Other (please specify) \_\_\_\_\_

For gifts to be split for two or more purposes, please specify how the gift should be allocated.

The Episcopal Church of St. Mary the Virgin  
2325 Union Street San Francisco, CA 94123  
Attn: Vicki Turk Phone (415) 921- 3665 ext. 316  
Fax (415) 921-6194  
e-mail: [finance@smvsf.org](mailto:finance@smvsf.org)