



Gifting Stock Transfer Instructions

Securities and mutual funds are one of the more effective assets to use when making a gift to the Presbyterian Church of Chatham Township. Making a gift of securities or mutual funds to us offers you the chance to support our mission work while realizing important benefits for yourself. The following instructions should be provided to your financial institution in order to transfer your securities to the PCCT Schwab account. Once in our account we will then be able to sell the securities and credit the proceeds to your donation.

Step 1:

An electronic **broker-to-broker transfer** should be initiated.

Please contact your broker to place an order to move the shares to PCCT's account with Schwab.

Specific directions should be given to make the transfer to:

Charles Schwab
22 North Park Place
Morristown, NJ 07960
DTC # 0164 Code # 40

For the account # 7212-6766 of:

The Presbyterian Church of Chatham Township
240 Southern Boulevard
Chatham, NJ 07928

Step 2:

Notify The Presbyterian Church of Chatham Township.

To insure proper crediting of your stock donation, please call Ceri Gilpin at 973.635.2340 or via email to cgilpin@pcct-nj.org to notify us that the transfer is underway. Once we have received gifted securities, we will sell them immediately, so we need to be alerted to look for them in our account. We will send you a letter acknowledging the donation and establishing the value we recognize in our Contribution Accounting System.

Please be prepared to provide the following information:

- Date stock transfer was initiated
- Name of Stock
- Number of shares
- Your name and contact information
- Use of funds (pledge, apportionment or other specific use)

Acknowledgement will be made in compliance with IRS regulations after the gift is received.

Thank you for your gift!