



## STOCK GIFT INSTRUCTIONS

### ELECTRONICALLY TRANSFERRED STOCK

For electronically transferred stock, please instruct your broker to use the following information for transferring gifts of publicly traded stock to Calvary Lutheran Church.

<b>Broker:</b>	Edward Jones 1375 S. Columbia Rd., Suite C-1, Grand Forks ND 58201
<b>Acct. Representative:</b>	Kristin Hanson
<b>Account Name:</b>	Calvary Lutheran Church, Grand Forks
<b>DTC Number:</b>	0057
<b>Account Number:</b>	370-12284-1-7
<b>Broker ID Number:</b>	403849

- For electronically transferred stock, the gift date is the date your stock arrives in the Calvary Lutheran Church brokerage account.

### REQUESTS / RECOMMENDATIONS

- Gifts of stock should be owned more than 12 months.  
*Note: Contributed securities owned for 12 months or fewer are considered a short-term asset, and in such cases the IRS requires that the donor's charitable deduction be based on the asset's cost basis rather than on its fair market value.*
- Privately traded stock will need prior approval from Calvary Lutheran Church.
- For a gift comprised of multiple assets, the gift date is the date on which the last of the intended assets is received by Calvary Lutheran Church.
- **Securities with Decreased Value:**  
It is recommended that you sell the securities first, recognize a capital loss for the difference between the purchase and sale price, and donate the cash proceeds by writing a check payable to Calvary Lutheran Church.
- **Securities with Increased Value:**  
Transfer securities directly to the Calvary Lutheran Church account with Edward Jones. Edward Jones will sell the securities on Calvary's behalf, therefore bypassing or avoiding tax on capital gain, depending on the type of gift.

### CONTACT US

Please contact our Calvary Finance Manager, Heather Vandervort, to advise her about any pending stock transactions so she can quickly attribute the gift to you and provide proper documentation for tax purposes.

To give other types of securities, including stock certificates, mutual funds, bonds, or other, please contact us.

**HEATHER VANDERVORT**  
Finance Manager, Calvary Lutheran Church  
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