



## Donating Stocks, Bonds, or Mutual Funds

If you wish to donate stocks, bonds, or mutual funds to Shepherd of the Valley, please complete the following steps.

1. Complete the Stock Donation Form and return it to the church office. If you have questions contact Michael Faust, 651.436.8248 or [mfaust@sov.church](mailto:mfaust@sov.church).
2. Ask your broker to transfer your gift to the church's brokerage account; your broker will need the following information.

<b>Wells Fargo Account Number:</b>	18944033
<b>DTC Number:</b>	0141
<b>Federal Tax ID Number:</b>	41-1314182

3. After the transfer and sale of assets is complete, Shepherd of the Valley will send you written details of the sale.

### *For Stock Certificates*

If you wish to donate a stock certificate registered in your name you must (1) supply a letter of instruction gifting the shares to Shepherd of the Valley Lutheran Church and (2) sign the reverse side of the certificate or provide a signed Stock Power document.



## Stock Donation Form

Complete this form for each stock, bond, or mutual fund.

Date \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP Code \_\_\_\_\_

Telephone \_\_\_\_\_ E-mail \_\_\_\_\_

Stock/Bond Name \_\_\_\_\_ Number of Shares \_\_\_\_\_

Shepherd Fund  General Fund  Building Fund  Other

Special Instructions

### *For Office Use*

Account \_\_\_\_\_

Date Received \_\_\_\_\_

High Price \_\_\_\_\_

Low Price \_\_\_\_\_

Finance Team \_\_\_\_\_

Average Price \_\_\_\_\_

Deposit \_\_\_\_\_

Fees \_\_\_\_\_

Acknowledgement \_\_\_\_\_

Receipt of Sale \_\_\_\_\_

Check  EFT