



## Gifts of stocks & bonds to Saint Pauls United Church of Christ

You can donate stocks or bonds to Saint Pauls UCC! This can be done to satisfy your annual giving commitment, to contribute to a capital campaign or for any other form of giving to Saint Pauls. Most mutual funds can also be gifted to Saint Pauls (please contact the church Treasurer, Tom Murray, at [murraytom91@gmail.com](mailto:murraytom91@gmail.com) to confirm your specific mutual fund is eligible).

When you donate appreciated stocks, bonds and mutual funds instead of cash, the benefit the church receives exceeds the cost of the original securities purchased. You'll get a charitable deduction for the full amount of your gift and avoid the impact of the capital gains taxes on the appreciated securities.

### Process

Gifts of securities to Saint Pauls UCC are managed through United Church Funds (UCF), which is the institutional investment ministry of the United Church of Christ. Your broker will transfer your desired security shares to the UCF brokerage account. Our instructions to UCF are generally to liquidate the securities and deposit the resulting proceeds into Saint Pauls' investment account or bank account.

### Instructions for you

Prior to initiating the transfer with your broker, please send an email to the Saint Pauls Accounting Office ([bookkeeper@spucc.org](mailto:bookkeeper@spucc.org)) with the following information:

- the cusip number, number of shares, and name of the security (you can get this from your broker)
- include your full name and mailing address (UCF will send you a confirmation letter by mail)
- the purpose of your donation so we can properly account for your contribution (for example, to fulfill your annual giving commitment, a capital campaign donation, an in memoriam gift, etc)

### Instructions for your broker

Please share the following information with your broker in order to process the transfer of securities to Saint Pauls UCC:

- DTC# 0443
- Pershing, LLC
- For Credit to account #: N7M001442
- Client account name: United Church Funds
- in the 'for further credit' or 'memo' field, also put: Saint Pauls UCC, Chicago, IL