



Stock Transfer Form

Please follow these simple steps to notify Bethlehem of your donation:

1. Contact your broker to initiate the transfer of your securities to Bethlehem Lutheran Church
2. Please complete this form at the time of the gift transfer so we can accurately identify, allocate, and acknowledge your gift. Send this form to:
Carolyn O'Grady
Bethlehem Lutheran Church
4100 Lyndale Ave S
Minneapolis, MN 55409-1447
Phone: 612-312-3402
Fax: 612-312-3399
or email the information to cogrady@bethlehem-church.org

Your name and address:

Securities Gifted

Number of shares _____ Name of securities _____

Date of transfer _____

Special Instructions/designation _____

Transferring Broker _____

Company _____ Phone _____

Electronic Transfer Information

Our Broker: UBS
DTC #: 0221

Contact: Brent Anderson
612-303-5838

Bethlehem Lutheran Church
General Fund
Account #: 7A 19805

Living, Giving, Thriving Capital Campaign
Account #: 7A 42869

Share the Spirit Capital Campaign
Account #: 7A 20366

Stock Transfer Form – cont'd

Valuation

The value of your gift will be the average of the high and the low trading prices on the date we receive your gift. The date of gift is the day Bethlehem assumes ownership of the security.

Benefits

Your gift may provide you with federal and state income tax benefits:

- If you itemize deductions on your federal income tax return, you may be able to deduct your contribution to Bethlehem from your adjusted gross income. In addition, gifts of appreciated property avoid long term capital gains tax. Check with your tax advisor for deduction and capital gains tax requirements and limitations for your situation.
- Your state may also allow a credit or deduction so you should ask your tax advisor.