



## 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 Twin Cities
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:  
Katy Stenross  
Bethlehem Lutheran Church Twin Cities  
4100 Lyndale Ave S  
Minneapolis, MN 55409-1447  
Phone: 612-312-3402  
Fax: 612-312-3399  
or email the information to [kstenross@bethlehem-church.org](mailto:kstenross@bethlehem-church.org)

Your name and address:

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### Donation to go to:

- Operating Fund  
\_\_\_\_\_ Year
- Opening New Doors  
Mission Appeal
- Other

### Securities Gifted

Number of shares \_\_\_\_\_ Name of securities \_\_\_\_\_

Date of transfer \_\_\_\_\_

Special Instructions/designation \_\_\_\_\_

Transferring Broker \_\_\_\_\_

Company \_\_\_\_\_ Phone \_\_\_\_\_

### Electronic Transfer Information

Our Broker: UBS                      Contact: Brent Anderson 612-303-5838

DTC #: 0221

#### **Bethlehem Lutheran Church Twin Cities**

Account #: **7A 50714 NEW ACCOUNT AS OF 9/1/2017**

Both Operating and Opening New Doors Mission Appeal donations will be deposited in the above account. Please check above to indicate which fund (Operating or Opening New Doors Mission Appeal) you want the donation given.

## **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 the gift is the day Bethlehem receives 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.