



## Gift of Securities to Barron First Lutheran Church

Donor  
Information

Owner/Co-Owner: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Phone Number: \_\_\_\_\_

Broker  
Information

Broker Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Broker Phone Number: \_\_\_\_\_

Broker Instructions

**Please gift shares of the following securities from my account per the following:**

My Account Number: \_\_\_\_\_  
Stock Symbol: \_\_\_\_\_  
Quantity of Shares: \_\_\_\_\_

**Please transfer the shares of stock electronically to:**

First Lutheran Church  
Account: AVJ202342  
Held at: Pershing LLC  
Address: Pershing LLC - Transfer Processing Attn: 382091  
500 Ross St. 154-0455  
City State: Pittsburgh, PA 15262-0001  
DTC #: 0443  
Tax ID: 39-0871868

**Contribution to be applied to:**

General Fund: \_\_\_\_\_  
Trust Fund: \_\_\_\_\_

\_\_\_\_\_  
Owners Signature

\_\_\_\_\_  
Co-Owner's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Donors may need to have the above signatures guaranteed via a medallion through a financial institution such as a bank or stockbroker. A notary public cannot provide a medallion signature guarantee.

### **To ensure a successful transfer of securities:**

1. Email a scanned copy to "[office@firstlutheran-barron.org](mailto:office@firstlutheran-barron.org) Attn: Trust Fund Committee" to allow the church to properly identify and acknowledge your gift
2. Provide this original form to your broker.

\*Please consult a tax professional before engaging in any transaction.

If you have any questions on how to fill this form out, please contact Sloan Financial Solutions at 715-418-2044.