



Church OF THE Epiphany

Donation of Securities Form

Church of the Epiphany-Tempe
Donation of Securities

This form is to notify you that I (we) will make a donation of the following securities:

Name/Ticker Symbol: _____

Number of Shares: _____

I (We) understand the exact value of this donation will be determined by the average of the high and low price for this security on the day the security is deposited in the account of Church of the Epiphany-Tempe.

I (We) believe the approximate value of the security to be \$_____.

This donation will be made by:

___ Donation of physical stock certificate

___ Electronic transfer from:

Financial Institution (of donor) name: _____

Account (of donor) Number [*Mutual Fund Gifts Only*]: _____

The donation is being made for the following purpose:

___ Pledge for _____ (*provide year*)

___ Endowment

___ Other: _____

Please credit our account accordingly. Thank you,

Print name(s): _____

DOB(s): _____

Address: _____

Signature(s): _____

Date: _____

Please return this completed form to the church office or via email to treasurer@epiphanytempe.org

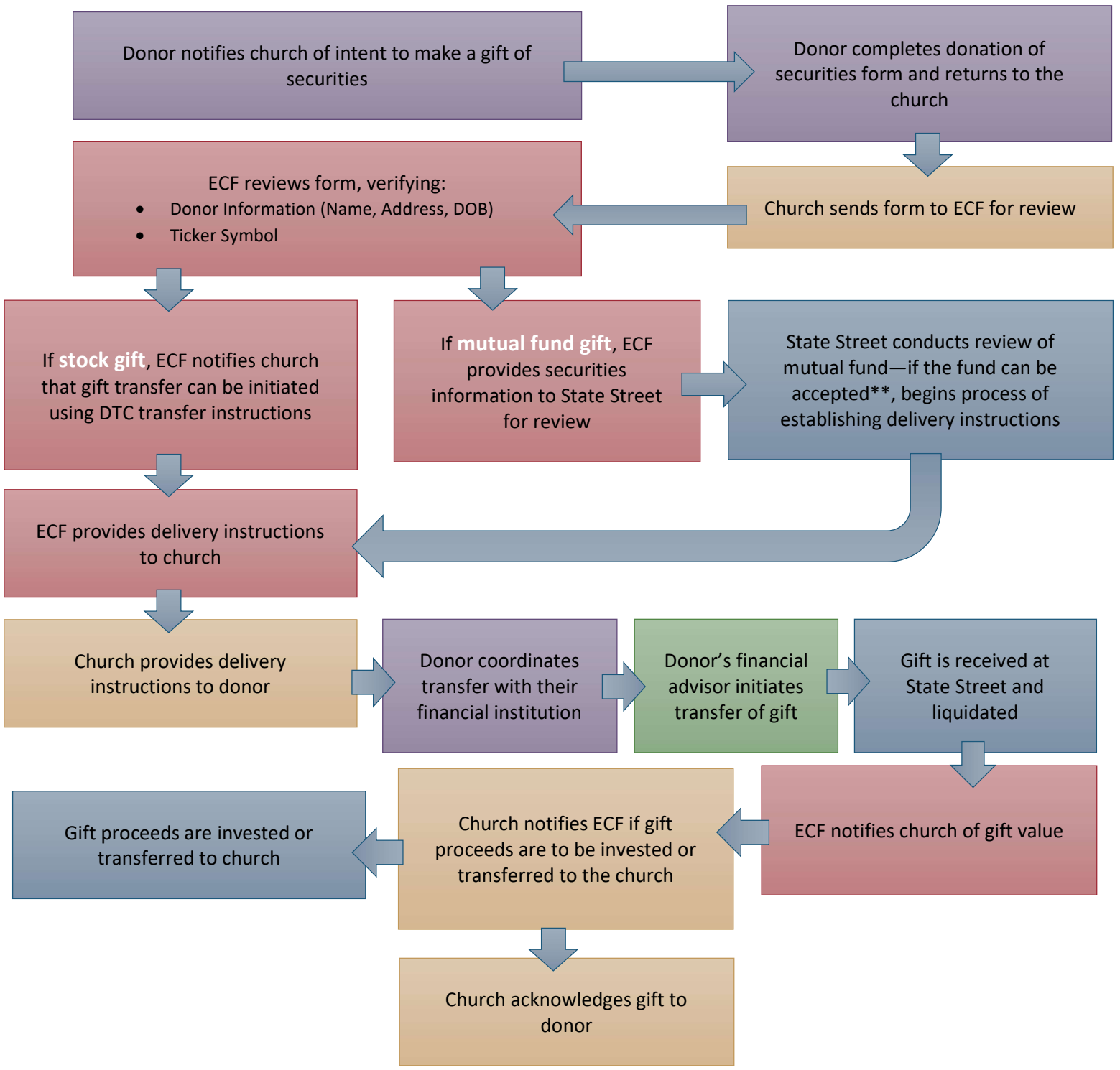
We will then provide transfer instructions.

Securities Gifting Sequence

1. Donor notifies church of intent to make gift of securities
2. Donor completes Donation of Securities Form and returns it to the church
3. Church sends form to ECF for review
4. ECF reviews form, verifying:
 - a. Donor Information (name, address, DOB)
 - b. Ticker Symbol
5. Following review:
 - a. If **Stock Gift**, ECF notifies church that gift transfer can be initiated using DTC transfer instructions
 - b. If **Mutual Fund Gift**, ECF provides securities information to State Street for review.
 - i. State Street conducts review of mutual fund. If the fund can be accepted, begins process of establishing delivery instructions.
6. ECF provides delivery instructions to church
7. Church provides delivery instructions to donor
8. Donor coordinates transfer with their financial institution
9. Donor's financial advisor initiates transfer of gift
10. Gift is received at State Street and liquidated
11. ECF notifies church of gift value
12. Church notifies ECF if gift proceeds are to be invested or transferred to the church
13. Gift proceeds are invested or transferred to church
14. Church acknowledges gift to donor

The following page contains a flowchart with visual representation of the information outlined above.

Making a gift of securities to Church of the Epiphany-Tempe



** State Street cannot accept mutual funds with back-end load fees. Donors must make alternate arrangements for these gifts.