

## Procedures for Gifting Stock to Woodinville Alliance Church

Those participating in the life and community of Jesus through Woodinville Alliance Church, may easily fulfill pledges or make stock contributions to our Church by following these procedures:

1. Contact Woodinville Alliance Church Treasurer, Dave Blackmer, at 425-481-5240. The Treasurer will provide instructions to accomplish a broker to broker stock transfer.
2. If the Treasurer is not available to assist with the transfer or the donor does not require assistance, please do the following:
  - a. The donor should instruct the donor's broker to transfer stock to Woodinville Alliance Church at **Charles Schwab DTC Number 0164**. The account to be credited at **Charles Schwab is #8996-5111**.
  - b. The donor must inform Woodinville Alliance Church Treasurer by email at [daveb@wachurch.us](mailto:daveb@wachurch.us) or phone at 425-481-5240, **the same day** specifying:
    - i. Name of stock and numbers of shares to be transferred
    - ii. Church Address and Phone Number (below)
    - iii. Designation of contribution:
      1. **General Fund** (Church ministries and Local outreach)
      2. **Great Commission Fund** (Intl Missions)
      3. **Benevolence Fund** (Financial Support for Church Community)
      4. **CAMA** (Intl Emergency Relief)
  - c. The donor should obtain from their broker a Gift Transfer Authorization form that should include the account transfer info for Woodinville Alliance Church (listed in A above).
    - i. A **sample** Gift Transfer Authorization form is attached on page 2 of this document. The sample cannot be used for your particular broker and is intended for illustration purposes only.

Dave Blackmer, Treasurer

### Woodinville Alliance Church

13940 NE 166<sup>th</sup> Street  
Woodinville, WA 98072  
Office | 425-486-0367

**SAMPLE STOCK GIFT TRANSFER FORM**



**Charitable Gift Transfer  
 Letter of Authorization**

- Complete, sign, and fax to: 1-877-824-3726, Attention: Outgoing Transfers. Clients of Investment advisors: Please return this form to your advisor.
- Use this form to make charitable gift donations by transferring stocks, bonds, and/or mutual funds from your Schwab account to an Individual or charitable organization account held at another financial Institution.
- For donations to a Schwab Charitable™ account, please use the Contribute to Your Donor-Advised Fund Account form. You can find the form in the Forms Center located on the Resources tab at www.schwabcharitable.org.

**1. Schwab Account Information**

Schwab Account Number	
Account Title/Registration	

**2. Securities to Be Transferred**

For each security listed, indicate either Purchase Date and Cost Per Share or Alternate Accounting Method.

Name of Stock/ Bond/Mutual Fund	Symbol/Ticker/ CUSIP	Number of Shares to Be Transferred*	Purchase Date (Optional)	Cost Per Share (Optional)	OR	Alternate Accounting Method (Please Indicate: FIFO, LIFO, Low-Cost, or High-Cost)
					OR	
					OR	
					OR	
					OR	

If a specific lot is not available, we will apply your account's default accounting method. FIFO (first in, first out) is applied when the mutual fund is set to average cost. Please reference the Cost Basis Disclosure Statement for additional details.

\*Only whole shares of equity/stock can be transferred (any fractional shares requested will remain in the account). Shares cannot be specified in a dollar amount.

**3. Transfer Instructions** (If you are transferring mutual funds, please contact the receiving Institution to obtain delivery instructions.)

Charitable Organization or Individual Recipient information:

Receiving Institution Account Number 8996-5111	Account Title/Registration Woodinville Alliance Church		
Contact Name at Charitable Organization or Name of Individual Recipient Dave Blackmer	Telephone Number (425) 486-0367		
Mailing Address 13940 NE 166 St	City Woodinville	State WA	Zip 98072
Name of Receiving Institution Charles Schwab	DTC Number (Required) 0164		

Your name will appear as the charitable gift donor unless you check the following box:

I wish for this gift to be anonymous.

**4. Authorization to Transfer** (All Account Holder signatures are required.)

Please accept this letter as authorization to irrevocably transfer the above listed security(ies) from my/our Schwab account to the designated individual or charitable organization listed above. Shares will be transferred in kind and are not to be liquidated. I hereby release and discharge Schwab and its affiliates from any liability or claims in connection with the aforementioned instructions and agree to indemnify and hold Schwab harmless against any losses from any action, claim, or demand of any person based upon Schwab acting under these instructions.

**Signature(s) and Date(s) Required**

<b>X</b> Account Holder Signature	Print Name	Date
<b>X</b> Additional Account Holder Signature	Print Name	Date

