

Stock or Bond Transfer Procedure to UUSS

UUSS deeply appreciates your generosity; thank you. Listed herein is the protocol for transferring securities gifted to the Unitarian Universalist Society of Sacramento.

- 1. You should contact your financial institution to find out what forms it requires for the transfer, for instance, bond transfers may be different from stock transfers.**
- 2. Please fill out this form and email or leave it in the UUSS office mail box for Bookkeeper, Michele Ebler (michele@uuss.org) when the transfer has been initiated. Stocks and bonds come into our account with no name attached. This form assists in accurate accounting.**
- 3. Once the transfer has been received in an UUSS account, you will receive a confirmation to advise you the market value that will be applied to your pledge or donation.**

Donor Name/s: _____

Donor's phone # _____ Donor's email _____

Financial Institution Transferring From: _____

Name or Letters of stock/securities being transferred: _____

Number of shares/securities being transferred: _____

Estimated total dollars to be donated: \$ _____

For? **Pledge** - Which year? _____ Amount \$ _____

Other _____ Amount \$ _____

Other _____ Amount \$ _____

Information for Financial Institutions to transfer funds to UUSS account:

CHARLES SCHWAB & CO - Josh Hurd, 525 Fulton Avenue, Suite #100, Sacramento, CA 95864, 916-973-3320

Account Name: Unitarian Universalist Society of Sacramento

Account Number 3295-0533

DTC Clearing 0164, Code 40

UUSS Tax ID Number 94-1251132

Donor Signature: _____ Date: _____

Thank you for your donation!