

# How To Donate Stock To Crestview Baptist Church

Electronic delivery of stock shares is the most secure and expedient delivery process available and provides efficient internal control as well as cost savings. However, you may also transfer certificates directly. To help you facilitate a gift of stock, please use the instructions that follow. Sample forms are attached.

## Step 1: INITIATE TRANSFER

There are three common methods of gifting Securities to Crestview Baptist Church. The first is electronic transfer through which your broker can transfer shares using the Crestview Baptist Church DTC number. The second is to personally deliver stock certificates to the church office. The third is to mail the paper certificates to Crestview Baptist Church.

If you use the electronic transfer method, you must contact your broker to initiate the transfer. Attached is a sample letter that your broker will likely require authorizing the transfer.

## Step 2: METHOD OF DELIVERY

Choose the available brokerage account open for accepting electronic transfers, or choose to deliver or mail certificates:

### A. SECURITIES DELIVERED ELECTRONICALLY

Donate your stock to the Crestview Baptist Church through our Pershing, LLC Broker

#### **Voya Financial Advisors**

909 Locust St  
Des Moines, IA 50309

**DTC Number:** 0443

**Account Name:** Crestview Baptist Church, Georgetown, TX (Tax I.D. Number 74-1398357)

**ACCT Number:** 3Z2 346930

**Phone Number:** 512.249-6780

### B. SECURITIES DELIVERED TO CHURCH OR MAILED

Deliver or mail your UNENDORSED certificate(s) with stock power and authorization letter, in separate envelopes. If you mail please send by registered mail, to:

#### **Crestview Baptist Church**

Attn: Jimmy Hausenfluke /Church Administrator

2300 Williams Drive  
Georgetown, TX 78628

**NOTE:** An authorization letter may be also be required by the broker. Certificates already registered in the name of Crestview Baptist Church do not require the stock power for execution of the transfer.

**Step 3: NOTIFICATION OF DONOR INTENT**

Regardless of the method chosen to deliver a gift of stock, the **donor or the transferring broker must provide the following information**, for audit and acknowledgment purposes:

- Donor's name and complete address
- Name and number of securities transferred
- Name of brokerage house shares will be transferred to (ING Financial Partners)
- Date of the transfer
- Specific designation of gift if any

Communicate the above information to Jimmy Hausenfluke.

**Crestview Baptist Church**

**Attn: Jimmy Hausenfluke, Church Administrator**

2300 Williams Drive  
Georgetown, TX 78628

**E-mail: jimmy@peoplesharingjesus.com**

**Phone: 512.863.6576**

**Fax: 512.930.1037**

Please call if you have questions.

Attachments:

- Stock Power
- Sample Letter to Broker