

## Stock Transfer Instructions First Unitarian Church of San Jose

**Step 1:**

Instruct your stock broker or stock plan administrator to transfer your shares to the Church's stock account at Schwab. Your broker will need the DTC number and account number for the church's account. Follow the procedure specified by your broker to verify that you authorize the transfer.

Transfer the stock to:

Charles Schwab, **DTC #0164**, account # **3295-0525** (First Unitarian Church of San Jose).

Stock certificates can also be taken directly to the San Jose Charles Schwab office at 121 Metro Drive, 408-437-1373). The back of the stock certificate must be signed by all persons named on the front of the certificate. A **Third Party Release** form provided by Schwab must also be signed & notarized by each person listed on the front of the certificate.

**Step 2:**

Notify the church treasurer that the stock has been transferred, and indicate how you want the stock to be credited. The most efficient way to notify the church Treasurer, Bob Howd is by electronic mail at [Bhowd@aol.com](mailto:Bhowd@aol.com) or by phone at **(408) 257-6844**. You may also mail this form attention to the Finance Officer at 160 North 3<sup>rd</sup> Street, San Jose, CA 95112. No matter how you notify the Treasurer, please include the following information:

<b>My Name:</b>			
<b>Street Address:</b>			
<b>City, State Zip Code:</b>			
<b>Day time phone:</b>		<b>Evening phone:</b>	
<b>I transferred</b>		<b>shares of</b>	
<b>Date of transfer:</b>		<b>Estimated value:</b>	
<b>Please apply my donation to the following funds:</b>			
Fiscal Year	Fund	Dollar Amount	✓Excess
2010-2011	Operating Pledge		
	UUA/PCD Fair Share Dues (\$80) (per member)		

If the Treasurer does not respond to your email or phone message within one business day, please contact the church office. In case the Treasurer is unavailable or out of town, another board officer can then sell the stock.

**Step 3:**

Some brokers transfer the stock the same day you request it. Others may take a few days. The Treasurer will watch for the stock to appear in the church's account so that it can be sold promptly.

The value of your contribution will be based on the average of the high and low prices of the stock on the date that the stock is received into the church's account. The Finance Committee will send you an acknowledgement of the donation shortly afterwards that serves as a receipt for tax purposes.

If there are any questions, please contact the church Finance Officer or Treasurer.