

SECURITY TRANSFER NOTIFICATION

Be advised that advance notice is essential to ensure the prompt and accurate processing of gifted securities. Complete the information below and email or fax it to the LCMS Foundation prior to initiating the transfer. Failure to do so could result in significant processing delays and loss in value.

LCMS Foundation Contact Information

Phone number: (800) 325-7912

Email: GiftedSecurities@lcmd.org

Fax: (314) 996-1132

Name of security and ticker: _____

Sending broker or transfer agent: _____

Number of shares: _____

Approximate value: _____

Date Transfer Requested: _____

How the securities are currently held (check one). See reverse side for transfer instructions.

- Electronically with an investment broker (transfer via DTC)
- Account – Mutual Funds/DRS/DRIP/etc. (transfer using transfer agent)
- Physical stock certificate

How the proceeds are to be distributed:

- Distribute to*: _____
Ministry Name

Ministry Address (City and State Required)

Designated for, purpose, or LCMS Foundation account number of ministry named
- Deposit to my LCMS Foundation account: _____
LCMS Foundation account number

**If distributing to more than one ministry, see reverse side.*

Fees will be assessed by the Foundation in accordance with the Fee Schedule applicable to the type of gift made. Contact the LCMS Foundation if you would like to receive a copy of the fee schedule.

Name

Phone Number

Address

Email Address

City, State, Zip Code

Signature(s)



SECURITY TRANSFER INSTRUCTIONS

DTC Transfer Instructions

Charles Schwab

DTC Participant #0164

Account Name: LCMS Foundation Account #: 61780941

Comments/FFC/FBO: (Insert donor last name - LCMS entity name)

Account to Account Transfers

Contact Brad Conrad at the LCMS Foundation to determine if an account exists with the mutual fund company before initiating any transfer.

Physical Security Instructions

LCMS Foundation

Attn: Brad Conrad

1333 S. Kirkwood Road

Saint Louis, MO 63122-7295

If a physical stock certificate is being gifted, a stock power must be completed and mailed separate from the stock certificate. It is strongly advised that the stock certificate be mailed via **Registered & Insured Mail** and be insured for the current market value of the stock. The stock power may be sent by regular mail.

GIFT DISTRIBUTION FOR MULTIPLE MINISTRIES

Ministry Name and Address (City and State Required)	Tax ID #	Purpose	% of Proceeds
			%
			%
			%
			%
			%
TOTAL			%