

STOCK TRANSFER FORM-SOUTHMINSTER PRESBYTERIAN CHURCH FOUNDATION

Southminster Presbyterian Church Foundation
12250 SW Denney Road
Beaverton, OR 97008-5803

_____ Date

To Whom It May Concern:

This is to advise you we have just transferred _____ of _____
Shares Stock Name

from our account at _____ to the Southminster Presbyterian
Broker

Church Foundation account at Charles Schwab to be divided as follows:

Amount of transfer above: _____

To be divided as follows: _____% Community Outreach fund

_____% Southminster Church fund

If not specified, the default split is 50% to the Community Outreach fund and the 50% to the Church fund.

Signed: _____ at _____
Church Member Phone #

The church has the following account as its broker:

Charles Schwab Southminster Foundation #8361-6368

Please place this in an envelope marked "Stock Transfer Form" and mail (mark "Attn.: Lisa") or turn in the envelope into the church office (the "Items for Lisa" folder).

If you have any questions, please contact one of the currently serving Trustees or Foundation Treasurer.

* A separate transaction must be made if funds are to be transferred to the Southminster Church

For Office Purpose Only

- ___ Office
- ___ Church Treasurer
- ___ Foundation Treasurer

Stock Transfer procedures noted on the back of this form.

Stock Transfers Procedures For Southminster Foundation:

TO: Foundation Treasurer; Lisa, Office Assistant; Marilyn, Bookkeeper.

1. If Lisa receives a stock donation form, she should keep a copy of the form and give the original to the Foundation Treasurer. If someone tells Lisa about making a stock donation, she will instruct him/her to complete a Stock Transfer Form as soon as possible (making sure they complete the correct form (Foundation—funds can not be split between the Church and Foundation)). She will also notify (by phone or email) the Foundation Treasurer of the stock transfer.
2. Foundation Treasurer will
 - a. make sure the donated stock got to the Foundation account
 - b. sell the stock as soon as possible
 - c. send thank you letter to the donor

TO: Congregational members wishing to make a stock contribution:

1. In order to a make stock transfer, you need to instruct your stockbroker or fiduciary to transfer the shares you are donating to the Southminster Foundation account at Charles Schwab, which is account #8361-6368. The broker or fiduciary will probably have a form they want you to fill out either on-line or on actual paper. Your broker or fiduciary may tell you the price of the shares at the time they actually transfer—this is the price that determines what you claim as a deduction on your taxes. If they do not, some donors use the average of the high and low price on the date the shares transfer. Consult with your tax advisor with any questions.

When the shares show up in Southminster Foundation's account at Charles Schwab, the Foundation Treasurer will issue a sell order at Charles Schwab. The Foundation's policy is to sell donated stock immediately and convert it into cash.

2. There is also a form in the church office that you need to complete (this form, front side). Donations are usually split evenly between two funds: Church building, program, and mission work, and Community outreach done through grants to community non-profits. The form gives you the option to tell us how you want the proceeds of your donation to be applied.