

Instruction for transferring stock to St. Luke's United Methodist Church

1. Contact your broker and ask that the stock or mutual fund to be transferred to the following account:

Stifel, Nicolaus & Company, Inc

St. Luke's UMC account # 1712-4435

DTC # 0793

St. Lukes's UMC Federal ID# 35-0985951

The name of our representative broker is **Amanda Arbeene, her phone # 571-4528**
(In case if you or your broker has any questions).

If you do the above process, so we can then make certain that you receive proper credit, **please contact Faina Kleyner at the church finance office - 846-3404 ext.313 and let her know:**

The Nature of the gift

The date of the transfer

The name of person(s) to be credited with the gift

The value of the gift

Information which fund you wish the gift to be applied

- i.e. Annual Campaign
- Capital Campaign
- Endowment

2. The second option:

You can bring your stock certificate to the church Finance office, sign and date it, and receive a receipt.

We will then credit the gift to your record and you will receive a confirmation on your next church statement.

Thank you very much.

If you have any questions, please contact Faina Kleyner at 317-846-3404 ext.313.