



LCMS Foundation
1333 S. Kirkwood Road
St. Louis, MO 63122-7295
800.325.7912
lcmsfoundation.org

APPRECIATED SECURITY TRANSFER INSTRUCTIONS

Please be advised that advanced notice to the Foundation is required to ensure prompt and accurate processing of all gifted securities. Please email and or call Sue or the general Gift Processing area regarding any and all gifts of appreciated securities.

LCMS Foundation Contact Information

Susan Sehrt 800-325-7912 x1621 Susan.Sehr@LFND.org
Gift Processing 800-325-7912 x3230 Gift.Processing@LFND.org

Please do not rely on brokers to notify us of your gift as they do not always contact us before the shares have been transferred or are unable to disclose client name or specific information as to how the gift is to be allocated.

The Foundation requires the information below to ensure proper transfer of securities:

Name of the security(s):

Ticker Symbol or CUSIP number (include mutual fund share class):

Where the shares are currently held:

How the shares are held (check one):

- Account - DRS/DRIP/etc. with transfer agent
Electronically with a broker via DTC
Physical stock certificate

Number of shares or approximate market value being transferred:

The LCMS entity(s) receiving gifting to and the percentage (if gift is being made to multiple entities):

- 1. % 2. %
3. % 4. %
5. % 6. %
7. % 8. %

Your current contact information so the Foundation may send a formal "thank you" gift receipt with the applicable information for use with your tax preparation.

Your name(s) Phone number
Address Email
City, State Zip



Because there are so many different ways a security maybe registered or held we ask that you **please contact us** to ensure the proper transfer instructions are being used. Those listed on the other side are only a few that we currently use.

## Appreciated Security Transfer Instructions **SECURITY TRANSFER DIRECTIONS**

### **DTC Transfer Instructions**

Charles Schwab  
DTC Participant #0164  
Account Name: LCMS Foundation  
Account #: 61780941  
FBO: (Insert Entity Name - donors last name)

### **Physical Security Instructions**

LCMS Foundation  
Attn: Susan Sehrt  
1333 S. Kirkwood Road  
St. Louis, MO 63122-7295

If a physical stock certificate is being gifted we ask that a separate stock power be completed and sent separately from the actual certificate. We suggest the stock certificate be mailed to us via **Registered & Insured Mail** and insure it for the current market value of the stock. Then send the stock power separately via regular mail unless you want to incur an additional cost for faster delivery. This is a more secure means of deliver whereby recovery is more likely should it get misplaced in route. Tracking numbers are extremely valuable when sending securities as they provide a means of following the package along the entire route of delivery.

### **Mutual Fund Transfers**

Before processing any mutual fund transfer contact Sue Sehrt at the LCMS Foundation to determine if there is an existing account with the mutual fund company. It is extremely important that pre-notification be provided to us if we are unable to match a security with the respective donor we will need to return the shares to the sending institution.