

**AUTHORIZATION OF STOCK TRANSFER**

to St. Luke's Episcopal Church, Evanston, IL

Please use this form to instruct your broker to transfer stock to St. Luke's. E-mail this form to [bookkeeper@stlukesevanston.org](mailto:bookkeeper@stlukesevanston.org) or mail it to St. Luke's Episcopal Church – Bookkeeper, 939 Hinman Ave. Evanston IL, 60202

Please prepare three copies of this form: one for your broker, one for St. Luke's, and one for your records.

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Donor's name)

\_\_\_\_\_  
(Donor's address)

\_\_\_\_\_  
(Donor's date-of-birth)

\_\_\_\_\_  
(Donor's telephone number)

\_\_\_\_\_  
(Name of your brokerage or bank)

\_\_\_\_\_  
(Name of your broker)

\_\_\_\_\_  
(Broker telephone number)

\_\_\_\_\_  
(Broker e-mail address)

This form authorizes the transfer of \_\_\_\_\_ shares of \_\_\_\_\_  
from account # \_\_\_\_\_ to St. Luke's Episcopal Church via their account at State Street  
Global Advisors for the following purpose:

Apply proceeds to my annual household pledge

Apply proceeds as a gift to St. Luke's (please check only one item below)

Unrestricted – *to be designated by Vestry for General Endowment fund or immediate use*

Permanent Endowment

Other purpose – *contact me about my gift*

\_\_\_\_\_  
(Donor Signature)

***Electronic Transfer:*** If securities are registered in book form/street name at a broker, give the following transfer instructions to your broker:

Send to the account of

State Street Global Advisors  
Attention: Scott Regan (telephone: 617.664.3182)  
DTC #987  
for further credit to St. Luke's Episcopal Church, Evanston, IL  
Account # 52-044173

***Physical Stock Transfer:*** If securities are held as physical certificates in your name, send the stock certificates along with a transmittal letter to the following address. You should sign the back of the stock certificate or sign an irrevocable stock power form. By signing the stock certificate or the stock power form, St. Luke's Episcopal Church takes ownership of the stock. You should send the certificates and the stock power form separately.

Charitable Asset Management  
Attention: Scott Regan  
One Lincoln Street, 24<sup>th</sup> Floor  
Boston, MA 02111-2900

***Acknowledgement of Receipt:*** Your gift date will be the date the stock is received into the account of St. Luke's. You will receive an acknowledgment from us noting the amount received. The gift will be valued at the average price on the day it was transferred to the parish account. Please contact your tax advisor regarding valuation for income tax purposes.