

NOTIFICATION OF STOCK TRANSFER
to St. Luke's Episcopal Church, Evanston, IL

Please use this form to notify St. Luke's of a stock transfer. E-mail this form to bookkeeper@stlukesevanston.org or mail it to St. Luke's Episcopal Church – Bookkeeper, 939 Hinman Ave. Evanston IL, 60202

Donor information

Date _____

Donor's name _____

Donor's address _____

Donor's date-of-birth _____

Details of transfer (e.g., number of shares, security name) _____

Intended use of proceeds

- 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*
 - General Endowment
 - Permanent Endowment
 - Other purpose – *contact me about my gift*

Instructions for transfer – please also notify St. Luke’s with this form when initiating a transfer

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 below address. You will also need to submit a stock/bond power form, which can be provided by State Street Global Advisors if you do not have this form available. This stock/bond power form will also need to be “medallion guaranteed” by a financial institution before submission. For questions on this process, please contact State Street Global Advisors.

Charitable Asset Management
Attention: Scott Regan
One Lincoln Street, 24th Floor
Boston, MA 02111-2900
Telephone: 617.664.3182
Fax: 617.204.0526

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.