



Shepherd of the Valley Lutheran Church
14107 Hudson Road South
Afton, MN 55001
651.436.8248 • 651.436.1931 (fax)

Procedure for Donating Stocks and Bonds to Shepherd of the Valley

If you desire to donate stocks, bonds, etc. to Shepherd of the Valley the following procedure will expedite the transaction.

1. Complete the Donating Stocks, Bonds, etc Form and return to the Office Manager at Shepherd of the Valley or FAX to 651.436.1931. If you have questions please contact Dick Wagenknecht or Kim Hanson at 651.436.8248.
2. Notify your broker that you will be donating the items to Shepherd. You should have the items transferred directly to one of Shepherd's three Brokerage Accounts.
3. If you know that the entire transaction can be completed electronically then you should use the account at Wells Fargo. You will need the following information.
Wells Fargo Account Number: 33075562
DTC number: 0733
Federal tax ID number: 41-1314182
4. If you will need personal service then you should use the account at UBS Financial Services Inc. in Stillwater. You will need the following information.
UBS Account Number: 7C-18251
DTC number: 0221
Federal tax ID number: 41-1314182
5. If you are using the 3M Shareowner Services, you will need the following information.
3M Account number: 4001644395
6. After the sale is completed by Shepherd of the Valley you will be notified in writing of the details of the sale.

Special Considerations

If you wish to donate a stock certificate registered in your name

- a) you must supply a letter of instruction gifting the shares to Shepherd of the Valley Lutheran Church
- b) you must sign the reverse side of the certificate or a signed Stock Power document

Disclaimer: Shepherd of the Valley will liquidate the Stock/Bond as soon as it knows that the stock or bond has been transferred to its account. The amount received from the sale of the stock or bond less the broker commission will be the amount credited to your donation.



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Donating Stocks, Bonds, etc Form

Complete this form for each transaction.

Date: _____

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone: _____ E-mail: _____

Stock/Bond Name: _____ Number of Shares: _____

Shepherd Fund: General Fund Building Fund Foundation
 Other

Special Instructions: _____

For Office use only

Date Stock Received: _____

Date Stock Sold: _____

Broker: _____

Receipts from Sale: _____

Date Financial Secretary: _____

Deposit: Check EFT

Date Thank You Letter: _____

Date Check Deposited: _____