

Stock Donation Instructions

Step 1: Complete Transfer

- *If the shares are held at a securities firm or other brokerage account:*
 - Instruct institution where securities are held to **transfer** the shares to the Buckman Bridge Unitarian Universalist Church (BBUUC) account at TD Ameritrade. DTC and Account Numbers are listed below.
 - **DTC #** 0188
 - **Account #** 788-257251
 - Instruct your broker to enter identifying information (i.e. your name and address, phone number, account number, broker information) into the "Text Comment" field of the DTC screen.
 - Your institution may require a specific form or a written Letter of Authorization
 - If you would like to transfer shares of mutual funds, please contact the Treasurer, Dale Crawford, at Treasurer@BBUUC.org or at (904) 291-2708 to make certain that the shares can be accepted. Our Broker TD Ameritrade accepts over 13,000 mutual funds, but charges \$49.95 for all mutual fund transactions. If you have Vanguard funds you'd like to donate, then we can provide information to transfer those shares directly to BBUUC's Vanguard account.

Step 2: Notify BBUUC of Gift

- Stock donations transfer to BBUUC's account with no accompanying donor information. In order for BBUUC to identify your gift and send a tax receipt you will need to provide us with the gift details requested below:
 - Name, Address, Phone number and E-mail
 - Name of Stock
 - Number of Shares
 - Approximate Date of Transfer
 - Your Brokerage Firm
- Please notify BBUUC of your donation in one of the following ways:
 - E-mail these details to Treasurer@BBUUC.org
 - Call the Treasurer, Dale Crawford at (904) 291-2708