

How can I contribute cash or stock to the Campus Renovation Project?

Members and friends can contribute to the project at any time. Please indicate on your check or to Jim Faris, Bookkeeper that your donation is for the Campus Renovation Project. See information below on gifts of stock.

How to Make Gifts of Stock and How the Gift will be Valued for Charitable Deduction Tax Purposes

You may donate stocks to the church in fulfillment of your pledge, or as a special non-pledge gift.

Stocks You Hold at a Brokerage Firm

You may wish to call your broker to ask the preferred procedure. Some companies require signature guarantees. Or, you may simply write your own letter to your broker. See attached example letter.

Be sure to send a copy of your communication to your broker to Jim Faris, Bookkeeper, at the church, as the broker will not notify the church. Alternatively, you can call Jim at the church number 619-298-9978, extension 8002 to alert him that a certain stock will show up in the church's account statement soon.

The Church has three brokerage accounts at Schwab:

- Account number 3295-0567 (Pledges, Capital Fund Donations, and other Gifts)
- Account number 1940-4435 (Care Giving Fund)
- Account number 3295-4814 (Ministerial Scholarship Fund)

The sample letter transfers 100 shares of common stock. Note the optional sentence which specifies a particular tax lot.

Be sure to use the correct Church account number.

Securities You Hold in Your Own Name

If you hold the stock certificate yourself, we suggest that you take it in person to a Schwab branch office rather than bringing it to the Church. The Schwab staff will show you where to sign the certificate on the back. They will give you a transfer authorization form to sign and will give you a receipt. Take with you the sample letter so that you have handy the Church's account number.

Some branch office locations for Charles Schwab & Company are:

8954 Rio San Diego Drive
Suite 100
San Diego, CA 92108-1659
619-574-4800

7777 Fay Avenue
Suite 105
La Jolla, CA 92037-4325
858-551-6301

16959 Bernardo Center Drive
Suite 110
San Diego, Ca 92128
858-618-7232

12481 High Bluff Drive
Suite 100
San Diego, CA 92130-3583
858-523-2440

You may also do this procedure by mail. Send the signed stock certificate by mail (insured) with a letter of instruction.

Valuation for Tax Purposes

Jim Faris, the Church's Bookkeeper, will obtain the high and low prices for stock for the date when the stock is transferred to the Church's account. The high and low prices will be averaged for the value per share of your gift. You will receive a letter from the church within two to three weeks of your donation.

Example Letter to Broker to Transfer Securities to the
First Unitarian Universalist Church of San Diego
4190 Front Street
San Diego, CA 92103
619-298-9978

Your address and phone number

Date

Your Broker's Address

Re: LETTER OF AUTHORIZATION TO TRANSFER ____ SHARES "XYZ" STOCK

Please transfer ____ shares of "XYZ, Inc." common stock from my account # _____
to the First Unitarian Universalist Church of San Diego.
(Optional: These shares were acquired by me on __/__/__, with tax cost basis of \$____)

The shares are to be transferred to the church's account at:

Charles Schwab & Company
P. O. Box 52114
Phoenix, AZ 85072-2114

Account number 3295-0567 (Pledges, Capital Fund Donations, and other Gifts)
Account number 1940-4435 (Care Giving Fund)
Account Number 3295-4814 (Ministerial Scholarship Fund)

The wire code is DTC 0164.

The Church's address is 4190 Front Street, San Diego, CA 92103.
The Church's Federal Tax ID # is 95-1713036.

Sincerely,

Your Signature

NOTE: If your account is a trust account, add after you signature "Trustee"

cc: Jim Faris, First Unitarian Universalist Church of San Diego