

**First Presbyterian Church of Waunakee**

**HOW TO GIVE STOCK OR MUTUAL FUND  
SHARES TO YOUR CHURCH**

Many have found that giving shares of stock or mutual funds to the Church is a good way to lower their taxes, while at the same time supporting the work of Christ's Church. If you have any questions about this process, please contact the Church Business Administrator, Sue Gade at 849-4625.

If the shares of stock you wish to donate are held in a brokerage account (i.e. you do not physically hold the stock certificates):

You would contact your broker to arrange what is referred to as an "Accommodation Transfer". Your broker will need the following information:

Stock to Transfer to First Presbyterian \_\_\_\_\_

Number of Shares to Transfer \_\_\_\_\_

Date Transfer is to be Effective \_\_\_\_\_

First Presbyterian Church of Waunakee's Federal ID Number is 39-1475269

The stock certificate should be mailed to:

First Presbyterian Church of Waunakee  
Attn: Finance Elder  
5763 County Road Q  
Waunakee, WI 53597

Or, shares can be electronically transferred to the First Presbyterian Church account opened at SB Financial Services at the State Bank of Cross Plains - Waunakee (contact Jeff Supple at 849-2706).

Instructions for electronic transfer:

DTTC Number 0075

Further credit to: First Presbyterian Church  
Account # 2999-2965

*(continued)*

***If You Hold the Shares You Wish to Donate (i.e. you physically hold the stock certificates):***

You could arrange such a transfer in the same manner as outlined in the previous section regarding Brokerage Account transfers. Alternatively, you may contact Jeff Supple at the State Bank of Cross Plains - Waunakee (608-849-2706) and he can take care of the transfer for you.

***If You Wish to Transfer Shares of a Mutual Fund:***

To transfer shares of a Mutual Fund, please contact Jeff Supple at the State Bank of Cross Plains - Waunakee (608-849-2706) to initiate the transfer for you. Please use the same electronic transfer account numbers as shown above under Stock Transfers.

***Additional Information***

In addition to the above, please provide the following to the Finance Elder.

Approximate Dollar Value of the Gift \_\_\_\_\_

How You Would Like the Gift Applied:

Building Fund \_\_\_\_\_

General Fund \_\_\_\_\_

Special Fund (please specify purpose) \_\_\_\_\_

Your Name \_\_\_\_\_ Phone # \_\_\_\_\_

Please give a copy of this form with all the blank lines completed to the Finance Elder by either placing it in his mailbox in the Church office, mailing it to him at the Church's address as above, or telefaxing it to him at 849-4608.

Thank you for considering this support of the work of First Presbyterian Church!

Kirk Anderson, Finance Elder

***'It is more blessed to give than to receive'. - Acts 20:35***