



Donating Securities to First Unitarian



To transfer securities (stocks, bonds, etc.) from your Brokerage Account to First Unitarian Society of Denver to support the **Annual Operating Budget**.

1. Complete the form.
2. Make a copy.
3. Send the original form to your brokerage firm.
4. ****Send copy to (or bring on a Sunday):****

First Unitarian Society of Denver
1400 Lafayette Street
Denver, CO 80218
Attn: Stewardship

Once the transfer takes place, the Treasurer will sell the securities as soon as possible, as it is the policy of First Unitarian to not hold on to any securities. Exact credit for tax purposes will depend on the particular security. Please check with your advisor. An acknowledgement will be issued for your records.

If you have any questions or concerns, please contact:

Karen Derrick-Davis, Stewardship Coordinator
Phone: 303-831-7113 x 104
Email: stewardship@fusden.org.

We appreciate your support of First Unitarian!

STOCK TRANSFER TO ANNUAL OPERATING

Investment Company

Address

City, State, Zip

Date

Re: Charitable donation of securities from _____
Your Name

Acct: _____
Your Account Number

To Whom It May Concern:

I would like to make the following donation to **First Unitarian Society of Denver**:

Name of Security _____

Description of security and amount to be transferred _____

Transfer to: Fidelity Brokerage Services, Inc.
DTC 0226
Attn Brokerage TOA Department
P.O. Box 660408
Dallas, TX 75266-0408

In the name of: First Unitarian Society of Denver
Fidelity Account # **X25124222**
FEIN 84-0203283
1400 Lafayette Street
Denver, CO 80218

If you have any questions or concerns, please contact Karen Derrick-Davis, Stewardship Coordinator, at stewardship@fusden.org or 303.831.7113 x 104.

Thank you for your prompt attention to this matter.

Signed,

(signature)

(printed name)

12/07/2017