



Stock Transfer Instructions with Fees

IMPORTANT NOTES BEFORE YOU BEGIN:

- Stock transferred to make a gift must have been held for at least one year and a day in order to receive a charitable deduction in the amount of the Fair Market Value of the stock.
- If you would like to transfer anything other than stock held at a broker, please email Shawn Greene at the ELCA Foundation at Shawn.Greene@elca.org for further instructions.

Complete the DTC form provided by your financial institution or the attached DTC Transfer Authorization form. Send the appropriate form to your financial institution in the manner they require.

Send the following information in an email to Shawn.Greene@elca.org or in a letter to the ELCA Foundation, Attn: Shawn Greene, 8765 W. Higgins Rd., Chicago, IL 60631-4101:

- Number of shares
- Name of stock
- Designation of the gift and mailing address of the charitable beneficiary
- Home address of donor
- Date you send DTC Transfer Authorization form to your financial institution

ELCA Stewardship Fees

For pass-through gifts of stock to non-churchwide ministries, please be advised that in the interest of good stewardship, the ELCA must charge \$.08 per share (minimum fee of \$25.00 and a maximum fee of \$250.00) in addition to the Wells Fargo Commission fee as follows:

Fixed Income orders.....No Commission
 Mutual Funds..... \$7 Ticket Charge
 Stock as follows:

- \$ 350 or less.....Below minimum commission*
- \$ 351 - \$ 10,000.....Minimum of \$55*
- \$10,001 - \$ 50,000.....1.50% commission*
- \$50,001 - \$100,000.....1.25% commission*
- \$100,000 or greater.....Capped at \$1,250*

*A \$7.00 ticket fee will be assessed in addition to the commission fee.

Be assured that the ELCA Stewardship Fees do not apply to

- Gifts that include a distribution of at least 25% or more to churchwide ministries that includes but is not limited to **Women of the ELCA Where Needed Most**
- Gifts to an endowment fund invested in the ELCA Endowment Fund Pooled Trust such as **Katie's Fund**.
- Funds directed to the Mission Investment Fund

If you have any questions or need further assistance, send an email to shawn.greene@elca.org or call 773-380-2976.



ELCA Foundation
Evangelical Lutheran Church in America
God's work. Our hands.

Financial Institution Address:

Re: Account Number _____

Please accept this letter as authorization to DTC transfer the following stock:

from my account number listed above, to the Evangelical Lutheran Church in America's account as follows:

Wells Fargo Advisors
DTC Clearing #0141
FBO Evangelical Lutheran Church in America
Account # 5103-9400

Please inform Shawn Greene (ELCA 1-800-638-3522, ext. 2976) as to the exact date the shares are transferred out of my account.

Sincerely,

Printed Name

Signature

Date

Printed Name

Signature (if Jointly Held Account)

Date

Signature Guarantee (If applicable)