



UNIVERSITY CONGREGATIONAL  
UNITED CHURCH OF CHRIST

## Instructions for Donating Appreciated Securities

Securities held at a bank or in a broker account are generally accepted for transfer to University UCC. The church is usually able to accept appreciated stocks, bonds or mutual funds. Transfers are made directly to the church through our broker at Stifel Nicolaus. Per the IRS, the church will give you credit for your donation using the average of the published high and low price for the security on the date of the transfer.

Our Financial Advisor is Garth Young at Stifel. Here is additional information that your own broker will need to assure a smooth transfer:

DTC #0793

Our account number at Stifel Nicolaus: 8453-5597

**Please be sure your broker notes your name as the donor on the transfer so that we can give you proper credit.**

**When you are making a transfer, please be sure to let the church know.**

Give Church Administrator David Anderson a call at 206-524-2322, or contact him by email or letter at the address below.

If you have any questions, please feel free to call Garth Young at 206-654-3900 or David Anderson at 206-524-2322. We will do all we can to make your donation go smoothly and easily for you.

Sincerely,

**David D. Anderson**

Church Administrator  
University Congregational  
United Church of Christ  
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**Garth Young, CFP®**

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