

## **ELCA FOUNDATION GIFTS OF SECURITIES INSTRUCTION SHEET**

### **Certificate Instructions**

First, send the certificate(s) in one mailing to the ELCA Foundation in Chicago. Send via traceable overnight mail, by carriers such as Federal Express, UPS, etc. or certified/registered mail. Please, it is very important, not to write on the certificate, fill in blanks or sign any names. Send the certificates just as they are.

Then, for each company send a stock or bond power form (form #3) signed the same way as name(s) appears on the certificate. Be aware of names appearing different from their regular signature. For example, full name, first name and middle initial, or just initials, or as trustee of a living trust. Sign the stock power the exact same way as on the certificate. If one of the individuals whose name appears on the certificate has died, the living person should sign only his or her name and send a certified copy of the death certificate, as well as a notarized affidavit of domicile (call Shawn). Both documents must be included with the stock power.

Finally, complete the gift letter (form #4) addressed to Wachovia Securities. The number of shares and name of the companies for all the certificates being gifted should be listed. The donor should sign with his/her usual signature. If certificates are held jointly, both owners need to sign the gift letter. Mail the gift letter to the ELCA Foundation along with the stock power(s). Please send the forms separate from the certificates.

The donor should send an application or letter of instruction to the ELCA Foundation that includes number of shares and name of stock being transferred, home address and distribution of funds.

### **DTC Transfer**

The donor should inform his/her broker in writing (form #1) that they wish to electronically transfer (DTC) stock to the Evangelical Lutheran Church in America account at Wachovia Securities. Donor\*s broker may require the signature(s) be Medallion Guaranteed.

The donor should send an application or letter of instruction to the ELCA Foundation that includes number of shares and name of stock being transferred, home address and distribution of funds.

If I can be of further assistance, please do not hesitate to e-mail or call.

Thank you,

Shawn M. Greene  
ELCA Foundation  
Senior Gift Processing Specialist

[www.elca.org/foundation](http://www.elca.org/foundation)  
800-638-3522, ext 2976