

Donation of Stocks, Bonds or Mutual Funds

Greenville Unitarian Universalist Fellowship

STEP ONE:

When you're ready to donate securities (stocks, bonds, or mutual funds), contact your broker to transfer the shares directly to the GUUF brokerage account at First Citizens:

For deposit to: **Pershing, LLC**
 Greenville Unitarian Universalist Fellowship
 Tax ID: 57-6081496
 Account #TNQ235144, DTC #0443

IMPORTANT: For your maximum tax benefit, do not sell the shares and donate cash.

STEP TWO:

Once you've authorized the transfer with your broker, notify GUUF **immediately** by sending an email to: cfo@greenvilleuu.org. Unless we get this notification we will be unaware of its arrival which could diminish the value and we will not know where the donation came from. This will delay liquidation AND we will be unable to give you timely credit for the donation.

Include information about the security donated and whether it is to satisfy a pledge, is a donation to the Endowment Fund or any other special instructions.

Optionally you can call the GUUF office and notify the Administrator of the donation and intended use.