



## DONATING SHARES OF STOCK by *ELECTRONIC TRANSFER*

**STEP 1:** Contact Saint Paul School of Theology of your intention to make a donation of stock (see STEP 3 below). This will ensure prompt acknowledgement of your tax deductible gift once made.

**STEP 2:** Instruct your broker to make a stock donation to Saint Paul School of Theology on your behalf. Give your broker detailed instructions of the stock gift using the letter draft below. Copy Saint Paul School of Theology. Transfer instructions are:

Please transfer\_\_\_\_(number) of shares of\_\_\_\_\_(stock name) from my account on or before (date of transfer) to:  
DTC #443  
Pershing LLC  
800-621-2246  
F/F/C: # R1C255360  
FBO: Saint Paul School of Theology, Overland Park, Kansas  
REF: Donation from (insert your name) for (describe gift's purpose)

**STEP 3:** Telephone (913-253-5000), e-mail or fax (913-253-5075) a Saint Paul representative concerning your forthcoming stock gift.

**Mr. Bernard Barry, Chief Financial Officer, ext. 5060, [bernard.barry@spst.edu](mailto:bernard.barry@spst.edu)**

**Mr. David Sisney, Vice President for Development, ext. 5080, [david.sisney@spst.edu](mailto:david.sisney@spst.edu)**

Saint Paul will acknowledge your gift with a tax-deductible charitable gift receipt. The stock will be valued in accordance with IRS regulations.

### **SAMPLE LETTER for your Broker and Saint Paul School of Theology**

Name and Address of your Broker

Re: Charitable Donation of Stock by Electronic Transfer  
My Brokerage Account No. \_\_\_\_\_

Dear Madam or Sir:

Please transfer\_\_\_\_(number) of shares of\_\_\_\_\_(stock name) from my account on or before (date of transfer) to:

DTC #443  
Pershing LLC (800-621-2246)  
F/F/C: Account # R1C255360  
FBO: Saint Paul School of Theology, Overland Park, Kansas  
REF: Donation from (insert your name) for (describe gift's purpose)

Please contact me by telephone (number) or by e-mail (e-mail address) if you have questions.

Sincerely,  
Donor name and signature  
Donor's spouse name and signature if joint tenant account