

# Stock Gift Instructions

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## Parishioner Stock Gifts

Should be directed to

- Church of Our Saviour account number: 2XR00019
- DTC Clearing # of Cetera Investment Services: 0701

Please copy on all correspondence

- CoS Bookkeeper/Treasurer [treasurer@chicagocos.org](mailto:treasurer@chicagocos.org)
- Administrator [office@chicagocos.org](mailto:office@chicagocos.org)

The donor should include the purpose of the gift (annual pledge, capital campaign, endowment, unrestricted gift, or some other purpose). Please also let us know the date of transfer so we can correctly record the gift date and value on your account.

**It is critical to let CoS know when stock gifts occur so we know who the donor is and can take action to avoid market losses.**

Church of Our Saviour greatly appreciates your interest in supporting the mission and ministries of Lincoln Park's Episcopal Parish.

We have standing orders to sell all securities; we will record the gift on the donor's statement at the market high price on the day of the transfer. Changes in value after transfer and brokerage costs will be recorded on the CoS income statement. Our broker may need to confirm their transactions. Any of the four CoS account signatories can confirm sell orders.

Treasurer

### Broker

Jeremy M. Davis, CFP®, CIMA®  
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[Jeremy@teamfia.com](mailto:Jeremy@teamfia.com)