



The Episcopal Church of the Epiphany

STOCK TRANSFER INSTRUCTIONS

Parishioners may wish to make tax deductible donations of appreciated securities to Epiphany. This form of giving offers several tax benefits to the donor. In this situation, Epiphany receives the full value of the securities less commissions and fees at the time of the donation, and the donor avoids paying capital gains tax that would otherwise be incurred if the securities were sold for cash. Consult the IRS or your tax advisor for further details.

To donate securities to Epiphany...

1. Instruct your broker or securities custodian to transfer the assets to Epiphany's brokerage account:

National Financial Securities (SunTrust)
Epiphany Account Number: G1R154202
DTC number: 226

2. Please email treasurer@epiphany.org and let us know the name of the stock, numbers of shares traded and where you want the proceeds applied. (i.e. annual pledge, capital campaign, etc.)
3. You will receive a letter stating the stock sold, # of shares and how it was applied for tax purposes.