



**CORAL RIDGE
PRESBYTERIAN CHURCH**

Instructions for Transferring Appreciated Securities

Thank you for your interest in transferring appreciated, publicly traded securities to Coral Ridge. This method of giving allows you to maximize your Kingdom impact, while receiving substantial tax benefits.* Please follow the instructions below to properly transfer gifted securities. If you have any questions, contact Nicole Monteleone at 954.334.5259 or nicole@crpc.org.

*Individual circumstances vary. Be sure to consult your tax advisor to determine any applicable tax benefits.

STEP 1: CONTACT YOUR BROKER TO INITIATE TRANSFER

Contact your financial institution to determine its specific process for making an in-kind transfer of securities to a non-profit.* You will likely be asked to complete a form provided by your broker outlining the name(s) and numbers of shares of the securities you would like to transfer. Your broker will need the account information listed below. If any additional information is required please contact Nicole Monteleone at 954.334.5259 or nicole@crpc.org.

Registration: Coral Ridge Presbyterian Church, Inc.

Tax ID: 85-801259606C-4

Receiving Firm: Fidelity Investments

Fidelity DTC: 0226

* Your financial institution must initiate the transfer of securities to Coral Ridge. Coral Ridge is unable to request the transfer on your behalf; however, we are happy to assist you however we can in this process.

STEP 2: NOTIFY CORAL RIDGE OF TRANSFER

Please complete the subsequent Charitable Securities Transfer Form and send it to Coral Ridge via email, fax, or mail. This is the only way to identify your gift as the brokerage transfer will not be named. Notifying Coral Ridge of your intent to transfer specific gifts allows us to identify your gift and provide you with accurate tax documentation.

Mail:

Coral Ridge Presbyterian Church
Attn: Nicole Monteleone
5555 North Federal Highway
Fort Lauderdale, FL 33308

Email:

Nicole Monteleone | nicole@crpc.org
(email transmissions are not secure)

Fax: 954.351.3336

STEP 3: CONFIRM TRANSFER WITH BROKER

Please confirm with your broker or advisor that the appropriate securities have been transferred to Coral Ridge's account. Once received, Coral Ridge will mail you a letter of acknowledgement. You will need this documentation for tax purposes.

Charitable Securities Transfer Form

Security Holder Name: _____

Email Address: _____

Address: _____

Phone Number: _____

Name of Delivering Broker: _____

Anticipated Date of Transfer: _____

Name of Security _____ Exact Number of Shares _____ Approx. \$ Value _____

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Name of Security _____ Exact Number of Shares _____ Approx. \$ Value _____

Total Approximate \$ Value _____

Coral Ridge Fund Designation:

Generation to Generation

General Fund

Outreach

Other _____