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.
Security Holder Name: 

Email Address: 

Address: 

Phone Number: 

Name of Delivering Broker: 

Anticipated Date of Transfer: 

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<th>Name of Security</th>
<th>Exact Number of Shares</th>
<th>Approx. $ Value</th>
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Total Approximate $ Value 

Coral Ridge Fund Designation:

- [ ] Generation to Generation
- [ ] General Fund
- [ ] Outreach
- [ ] Other