



Instructions for Transfer of Donated Stock to Southern Baptists of Texas Foundation

Note: The deadline for the Foundation receiving stock and mutual fund gifts for processing in 2018 is December 10, 2018.

When transferring donated stock into the Southern Baptist of Texas Foundation (Pershing) account, the donor will need to have the stock transferred using the following information.

1. Please transfer the stock to the following account:
 - a) For DTCC eligible securities and Option Clearing Corporation eligible options send to clearing broker number 0443.
 - b) Beneficiary Account: Southern Baptists of Texas Foundation
Beneficiary Account Number: TH8-132351
2. Please contact the Southern Baptists of Texas Foundation to let them know the transfer is coming.
3. Please send (mail, fax, or email) a letter, endorsed by the individual(s) whose name(s) appear(s) on the stock account, acknowledging the gift and informing the Southern Baptists of Texas Foundation of the details and purpose of the transfer. Include your name, address, name of stock, number of shares, and your broker's name.

For example: "I wish to donate 25 shares of (name of stock) to the Southern Baptists of Texas Foundation. These shares are for the benefit of (church or other ministry)."

In the case the delivering firm has any questions or problems, please contact Barbara Davis at bdavis@sbtxasfoundation.com or Brittani Dickenson at bdickenson@sbtxasfoundation.com.

Contact Information

Southern Baptists of Texas Foundation

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