



## Direct Electronic Transfer of Stocks and Bonds

Gifting stocks and bonds to the church can be an excellent way to support the Shepherd of the Valley ministries while minimizing your tax consequences on appreciated stocks and bonds. One of the considerations you should be aware of is that your stocks and bonds need to be transferred directly to SOTV's brokerage account in order for you to take full advantage of the tax benefits available on stocks and bonds that have appreciated in value. If your stocks and bonds have not appreciated in value it may be more advantageous for you to sell these instruments directly and donate the proceeds to SOTV. Please contact your broker or tax advisor concerning which option is best for you.

To help you in the transfer of stocks and bonds into the SOTV church account, please follow the following procedures:

1. Please instruct your broker or institution to do a DTC Transfer.
2. Send the shares to:  
**charles SCHWAB**  
DTC # **0164**  
Account # **9199-9890**  
Account Name - **Shepherd of the Valley Lutheran Church**  
EIN **41-1439981**
3. When you instruct your broker to make the transfer please call, write or e-mail Dawn Della Paolera – Finance Manager ([dawn.dellapaolera@sotv.org](mailto:dawn.dellapaolera@sotv.org)), with the details of your stock transfer. Due to confidentiality requirements, our brokerage firm will not know the name of the donor when they receive notice of the transfer from your broker so it is imperative that you contact us with the following information so we may send you a letter of receipt and give you the proper donation credit:
  - **Name of Stock**
  - **Number of Shares**
  - **Which fund(s) you would like the proceeds to be allocated to**
4. If you or your broker should have any questions please feel free to contact Dawn Della Paolera at 952-985-7315.

Our church policy regarding receipt of stocks is to sell those stocks as soon as we receive them. Once we receive notification the stock or bonds have been sold by our broker we will send you a donation letter outlining the number of shares received, their high and low value for that day, the average value of the stocks or bonds and the funds you designated the contribution for.

Thank you so much for your support of the ministry here at Shepherd of the Valley Lutheran Church. Your generosity will enable Shepherd of the Valley to reach out to our community and the world with the good news of Jesus Christ. God Bless you.

Dawn Della Paolera  
SOTV Finance Manager  
952.985.7315