

## **Elmbrook Church Stock/Securities Donation Procedures**

Making a charitable donation of securities to Elmbrook Church is easy!

- If your broker holds the stock in “*street name*,” they can transfer the shares electronically. Deliver to brokerage account listed below:
  1. Broker Company: Pershing LLC
  2. Broker Contact and Telephone: Casey O’Gorman, 262-522-8484, ext. 2
  3. Account Number: JGH568540
  4. Name on Account: Elmbrook Church, Inc.
  5. DTC #: 0443
  6. Please advise Joy Peterson at Elmbrook Church the number of shares and full name of the stock you wish to donate, the firm the shares are coming from with the anticipated delivery date.
  
- If you physically hold the actual stock
  1. In the presence of a bank official who can **Medallion Guarantee** your signature, sign the back of the stock certificate identical to the registration on the front, at the place marked “signature”.
  2. Prepare a letter to Ferrito & O’Gorman Financial Group, requesting the shares to be gifted to Elmbrook Church account number “**JGH568540**”.
  3. Delivery the **Medallion Guaranteed** signed stock certificate and Ferrito & O’Gorman letter to the Controller at Elmbrook Church (do not assign or reissue the stock to Elmbrook Church). Once the back of the stock certificate is signed, the stock is negotiable. Please handle with care!
  4. Elmbrook Church will mail the stock and letter via certified mail to our broker.
  
- To enable us to provide you with an accurate and timely acknowledgement for your tax records, **it is critical that you or your broker inform us of the name of the stock you are gifting, number of shares and how you would like to have the proceeds allocated.**

If you have any questions, please call Joy Peterson, at (262) 780-1818 or email [jpeterson@elmbrook.org](mailto:jpeterson@elmbrook.org).