

WALNUT CREEK PRESBYTERIAN CHURCH
STOCK AND SECURITIES TRANSFERS

Thank you for your interest in supporting the ministries of Walnut Creek Presbyterian Church. Your gift will make a difference in the life of the Church and those who benefit from its work here in Walnut Creek and around the world. Please consider this gift prayerfully, asking God for his guidance in the management of the resources he has entrusted to you, and seeking his blessing of this gift for his use.

The process of contributing stock and other securities to WCPC is quite simple, and those who contribute in this manner often benefit through charitable contribution deductions equal to the market value of the securities on the date of the transfer. The process involves 1) providing your broker with a request to transfer securities to the account of WCPC, 2) notifying WCPC of the incoming transfer, and 3) keeping a record of the transfer for tax preparation purposes. The inclosed forms are designed to accomplish each of these tasks. Following completion of the transfer, you will receive a letter from WCPC that serves as a receipt for the contribution.

Attachment 1 to this letter provides your broker with the information needed to process the stock transfer. Please fill in the blank spaces on this form and submit it to your broker. Following receipt of this form, your broker will make the requested transfer to the account of WCPC. Attachment 2 provides WCPC with the information necessary to properly handle your contribution once it is received by WCPC. This form enables WCPC to identify the transfer and use the contribution in accordance with your wishes. Please complete this form and mail or deliver it to the Church office. Attachment 3 is for your personal records. Please complete this form and keep it. It will assist with the preparation of income tax returns.

If you have questions concerning this process, please contact the Church office at 925/935-1574.

Thanks again for your consideration of this gift.

Attachment 1. Transfer Request Form

To: _____

Date: _____

Please accept this letter as a request for a transfer of securities from my account to the account of Walnut Creek Presbyterian Church. This transfer is being made as a charitable contribution. The details of the requested transfer are as follows:

Number of shares _____

Description _____

Transfer from account:

Account Owner _____

Account Number _____

Transfer to account:

Charles Schwab & Co., Inc.
DTC Clearing 0164, Code 40
For the account of Walnut Creek Presbyterian Church
Account # 9171-1710

Sincerely,

Signature of account owner

Printed name of account owner

Attachment 2. Contribution Handling Form

To: Walnut Creek Presbyterian Church
P.O. Box
1801 Lacassie Avenue
Walnut Creek, CA 94596

Attn: Finance Department

I have recently requested a transfer of securities to the account of Walnut Creek Presbyterian Church. This transfer is being made as a charitable contribution to the Church. The details of the transfer are as follows:

Date request was made: _____

Number of shares transferred: _____

Description of shares: _____

Please apply the proceeds of the sale of these securities as indicated below:

_____ General Operating Fund

_____ Other (Description) _____

Sincerely,

Signature

Printed Name

Attachment 3. Record of Securities Transfer

Please retain this for your records

Securities transferred to Walnut Creek Presbyterian Church as charitable contribution.

Description of securities transferred: _____

Number of shares transferred: _____

Transfer Date: _____

Opening Value on Transfer Date: _____ (A)

Closing Value on Transfer Date: _____ (B)

Average Value on Transfer Date: _____ (C)
(Average of the values A and B)

Value of the contribution: _____
(Average Value (C) multiplied by number of shares transferred)