

*Episcopal Church of St. Mary in the Highlands*

1 Chestnut Street, PO Box 351, Cold Spring, NY 10516

845-265-2539 [OFFICE]

STMARYINTHEHIGHLANDS@GMAIL.COM

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## Making Gifts of Securities (Stock, Bonds, ETF's)

If you are interested in giving a securities donation to St. Mary's we provide the following procedure:

1. Send an e-mail or letter of instruction to your broker specifying the issuer and number of shares of the stock that you wish to transfer to St. Mary's, along with any special designation if other than annual pledge for your gift.
2. Include in your letter the information on St. Mary's account at **Charles Schwab & Co., Inc.:**

***Client Information:***

Schwab Account Number

**St. Mary's Church in-the-Highland's**

#9846-4126

DTC #0164

Federal EIN: 14-6017940

Charles Schwab & Co., Inc.

3. Please send a copy of your e-mail or letter of instruction to St. Mary's, the Rev. Steve Schunk, or to our Treasurer, Carol A Powell, by email to:

[stmaryscoldspring@gmail.com](mailto:stmaryscoldspring@gmail.com)

or USPS mail to:

PO Box 351

Cold Spring, NY 10516-0351

4. Request your broker to notify St. Mary's when the transfer is taking place by contacting **Carol Powell** (St. Mary's Treasurer) at **845-265-2539** or email to: **[stmaryscoldspring@gmail.com](mailto:stmaryscoldspring@gmail.com)**

**It is very important to notify us of a stock or other securities transfer** as the information we receive does not always contain the donor's name!

You will receive an acknowledgement letter that includes the date the stock was received by St. Mary's and its value. If you have additional questions about this procedure, please call or email us.

On behalf of the Warden, Vestry and People, please know that St. Mary's is truly grateful for your generosity and thoughtfulness.

*Father Steve+*

The Rev. Steve Schunk, *Priest-in-Charge*