

## **ST. ANNE'S IN-THE-FIELDS**

### **INSTRUCTIONS FOR STOCK OR SECURITIES GIFTS**

At the time you plan to donate stock or other securities, please be sure to inform the church's Treasurer directly or request your broker to do so by phone or email at the below contacts. This will enable the Treasurer to monitor whether such stocks or securities are received whereupon our broker will be given instructions to liquidate such donated stocks and / or securities at the time of gift. Following the liquidation of such stocks or securities, you will be provided a confirming letter for your tax records.

At the time you donate stock or securities, please be sure that you or your broker also specifies to our broker, Fidelity Investments:

- 1) an authorization to identify the donor source of such donation
- 2) whether the donation is intended for Annual Stewardship or other purposes such as the Building Fund / Capital Campaign

**Donations for Annual Stewardship or Restricted Gifts should be directed to the Church's account # X99-002356.**

**Donations related to the Endowment should be directed to the Church's account # X01-664723**

**BROKERAGE: FIDELITY INVESTMENTS**

**ACCOUNT NAME: ST. ANNE'S IN-THE-FIELDS**

**DTC #: 0226**

If you have any questions, please don't hesitate to contact me at:

EMAIL: treasurer@stanneslincoln.org

PHONE: 781-259-8834 ext. 205

Thank you,

DOUG HARDING  
TREASURER  
ST. ANNE'S IN-THE-FIELDS  
LINCOLN, MA 01773