

How to Make a Gift of Stock

The Unitarian Universalist Congregation of Atlanta (UUCA) welcomes gifts of stock for one-time donations or pledge payments. To complete such transfers simply follow the instructions and review the conditions detailed below.

1. Notify Karen Roy, UUCA Director of Administration, via e-mail at karen.roy@uuca.org of what stock you are planning to transfer along with the number of shares and their total anticipated value.
2. Transfer the stock to “The Unitarian Universalist Congregation of Atlanta” (Account Number 4093-1634) via:

Charles Schwab & Co., Inc.
Orlando Operations Center
P.O. Box 628291
Orlando, FL 32862-8291

Should you or your broker require it, Charles Schwab’s Tax ID Number is 94-1737782 and their Clearing Number is 0164. Also, their customer service number is 800-435-4000.

3. When Charles Schwab receives your gift of stock, we will sell it as soon as possible (preferably within the same 24 hour period), and the amount credited to your congregant gift record will be the amount UUCA receives at the time of the sale.
4. After UUCA receives notification that the stock has been sold, you will receive a letter acknowledging your gift of stock.
5. The amount you take as a non-cash tax-deductible gift is usually the amount of the stock when it was first given; please consult your accountant or tax professional on the most current tax laws and guidelines relating to such donations.

Should you have any questions please feel free to call 404-634-5134 extension 212 for assistance.

Thank you for your generosity to UUCA. We very much appreciate your support!

Sincerely,
The UUCA Staff