

HOW DO I DONATE SECURITIES?

1. Donating securities for your capital campaign or annual financial commitment can have tax and other advantages. Only you and your financial advisor can determine when this is appropriate for you. If you would like to donate securities, use the information below.
2. Please notify Travis Vaughn, UUCA Office Administrator, via e-mail at travis.vaughn@uuca.org of which stock (name and symbol) you are planning to transfer along with the number of shares and their total anticipated value. This information is necessary so we may process your gift and send acknowledgment in a timely manner.
3. Transfer the stock to the “The Unitarian Universalist Congregation of Atlanta” account at Charles Schwab & Co., Inc.

Account Number: 4093-1634
DTC Number: 0164
Schwab Tax ID: 94-1737782
UUCA Tax ID: 58-0707530
Schwab phone: 1-800-435-4000

4. After UUCA receives notification that the stock has been received, you will receive a letter acknowledging your gift of stock.
5. When Charles Schwab receives your gift of stock, we instruct them to sell it as soon as possible.
6. You will most likely want to consult your accountant or tax professional on the most current tax laws and guidelines relating to noncash donations.

Please feel free to email Travis Vaughn at travis.vaughn@uuca.org if you have questions or need additional information.

Please note:

If your gift is mutual funds specifically, direct your broker to contact our custodian, Charles Schwab, at 602.355.9003. Please be sure your broker confirms the BIN number for mutual fund transfers with Charles Schwab prior to delivery. All deliveries must reference UUCA and account number 4093-1634. For mutual fund transfers, it is advised that you (the donor) write a short letter to initiate the gift transfer. This letter should include your account information and be signed by you.