



## How to Electronically Transfer Securities

1. Contact the church in advance of the transfer either by phone or letter. You may inform the Senior Pastor, Church Secretary, Chairperson of the Board of Trustees or Chairperson of the Planned Giving Committee of your intent. (Their contact information is given below.) Tell them the name of the stock, the number of shares you will be donating, and for what purpose (e.g. Building Fund) you would like the securities designated towards. This information will aid in identifying you (as the donor) when the gift is received into our Morgan Stanley account, for many times electronic stock transfers do not arrive with your name on it.

2. Contact your broker and inform him/her of your intentions to gift the church some stock. You will be asked to complete and sign a specific form to make the transfer. The following information will be needed to complete the form:

Trinity UMC's broker account is held at **Morgan Stanley Wealth Management**

Mr. Derek Mears, Broker

(Michelle Hopkins, Assistant)

231 N. Woodland Blvd, DeLand, FL 32720

Telephone # (386) 740-2015

**Trinity UMC's Account # 669-019647-018**

**DTC # 0015**

**Trinity UMC's Tax ID # 59-1496877**

Following is the contact list of the church's official representatives with regard to this matter:

Pastor Brian Carr Senior Pastor 386-734-4425 <a href="mailto:bacarro072890@att.net">bacarro072890@att.net</a>	Lori Jones Church Secretary 386-734-4425 <a href="mailto:trinitymgr@cfl.rr.com">trinitymgr@cfl.rr.com</a>
Charlie Daniels Chairperson – Trinity Board of Trustees 386-843-4496 <a href="mailto:daddyof3crd@gmail.com">daddyof3crd@gmail.com</a>	Anita Campbell Chairperson – Planned Giving Team 386-734-9224 <a href="mailto:anita.campbell2468@att.net">anita.campbell2468@att.net</a>