



How to Electronically Transfer Securities to Trinity UMC

1. Contact the church in advance of the transfer either by phone or letter. You may inform the Senior Pastor, Office Manager, 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) 142 S Woodland Blvd Ste 100, DeLand, FL 32720; Phone: (386) 740-2000. **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 regarding this matter:

Rev. Dale Golden
Senior Pastor
386-734-4425

seniormgr@trinitydeland.org

Lori Jones
Office Manager
386-734-4425

officemgr@trinitydeland.org

Dan Vergara, Chairperson
Board of Trustees
407-462-0584

danielvergara@att.net

Anita Campbell, Chairperson
Planned Giving Team
386-734-9224

anita.campbell2468@att.net