

Santa Clara First Baptist

3111 Benton Street, Santa Clara CA 95051
Church Office (408) 241-7635
www.scfbc.org

Gifting Via Direct Electronic Transfer of Securities

Gifting Stocks and other marketable securities can be an excellent way to support the ongoing ministry of Santa Clara First Baptist Church while minimizing your tax consequences on appreciated investments.

One of the considerations you should be aware of is that your securities need to be transferred directly to SCFBC's brokerage account in order for you to take full advantage of the tax benefits available. If your investment has not appreciated in value it may be more advantageous for you to sell it directly and donate the proceeds to SCFBC. Please contact your broker or your tax advisor concerning which option is best for you.

To help you in the transfer of stock to Santa Clara First Baptist Church, please follow these steps:

Please instruct your broker or institution to do a DTC transfer, sending the shares to:

E*Trade Securities

1-800-387-2331

DTC # 0385

Account # 4544-5489

Account name: Santa Clara First Baptist Church

Please email bookkeeper@scfbc.org with the details of your stock transfer.

It is imperative that you contact us with the following information:

Name of Stock or Security

Number of Shares

Any Designation of Funds (e.g.—General Funds, Courtyard..)

Our policy regarding receipt of investments is to sell those securities upon receipt.

Thank you for your faithfulness and generosity!