

## STOCK DONATION TO CHURCH OF THE NATIVITY

The following procedure is required for transferring stock from your broker or shares held individually by you:

- **STOCK CERTIFICATES PERSONALLY HELD:** Contact Mr. Robert Roepke, at Merrill Lynch (919) 829-2094. Indicate that you wish to donate the stock to the Church of the Nativity and reference account # 778 04338. Mr. Roepke will help you with the transfer paperwork for your stock certificates.
- **STOCK HELD IN A MERRILL LYNCH ACCOUNT:** For a telephone transfer, contact Mr. Robert Roepke at (919) 829-2094 and indicate that you wish to transfer stock to the Church of the Nativity account # 778 04338. Mr. Roepke will then assist with the stock transfer.
- **STOCK HELD IN AN ACCOUNT WITH ANOTHER BROKER:** You will need to contact your broker for details on how to transfer stocks to Nativity's account at Merrill Lynch. Your broker may have online functions to initiate such a transfer, or they may have forms on their website that can be printed, filled in by you and mailed to your broker. Indicate on the form that you wish to transfer stock to the "Church of the Nativity" and reference account # 778 04338 at Merrill Lynch. Merrill Lynch's DTC Number is 8862. You may also contact Mr. Roepke at Merrill Lynch for questions or help.

It is always a good idea to let Mr. Roepke's office know that you have initiated a transfer to Church of the Nativity, so they can watch out for the transfer to occur. Mr. Roepke's email address is [Robert.Roepke@ml.com](mailto:Robert.Roepke@ml.com). You may also contact Sharon Cronlein, who is a Senior Client Associate in Mr. Roepke's office: [Sharon.Croenlein@ml.com](mailto:Sharon.Croenlein@ml.com).

For those with IBM shares held by ComputerShare, a broker transfer form can be printed from <https://www-us.computershare.com/Employee/Documentation/FormsCatalogue.aspx>. Fill out the form and mail it to ComputerShare at the address at the bottom of the printed form.

**NOTIFY NATIVITY:** Please fill in the lower part of this form in order that Church of the Nativity can have adequate documentation of your donation and acknowledge your contribution when the stock transfer has been completed. Return this form to the Nativity Business Manager [BusMgr@nativityonline.org](mailto:BusMgr@nativityonline.org) at the church before the transfer is expected to happen.

Name:	
Phone:	
Address:	
Name of stock:	Number of shares:
Requested transfer date:	
Disposition of funds at Nativity:	Annual Stewardship Year:
	Other (Please specify):

If you have any questions, please call Bill Sena (Nativity Treasurer) at (408) 398-5000.

Thank you for your support.