**Instructions For Giving Gifts Of Stock To The Church**

 If you are holding shares of stock that you would like sold — the proceeds of the sale going to the Church as a cash settlement — there is a quick and easy way to do this and avoid transaction fees and possible capital gains penalties.

Please follow these instructions if you currently own stock and would like to have its cash value given to the Church’s General Fund:

1. Contact your broker and decide what stock and how many shares you wish donated to the First Congregational Church of Deep River.
2. Provide your broker with the following information:

**Our Church’s Fund Manager is: Essex Financial Services, Inc.**

**Our Church’s fund account number is: 645-557087**

**The DTC number is: 0226**

**(*Note that this number is for stocks only. If you are interested in transferring***

***other investment instruments, please contact a Church official.)***

**The Custodian is: Fidelity Investments**

1. Have your broker contact **William Tait at 860-767-4300** to let him know that this stock transfer is being scheduled. Specifically state that this a stock gift that is to be sold for cash at the earliest opportunity — the proceeds of the sale should be turned over to the Church’s General Fund.
2. Have your broker provide you with the value of the stock at the time of transfer.
3. Be sure to let the Church Treasurer and Collector know of your gift so that it can be recorded in the most timely and efficient manner.
4. Consult your accountant or attorney to determine to what extent this charitable donation may be declarable on your next tax return filing.

**NOTE**: *When this stock transfer into the Church’s account has been completed, Essex Financial Services will* ***sell the stock*** *on your behalf at the current market value and will forward all proceeds of the sale to the Church’s General Fund. If you are interested in making a gift of stock in kind and have the stock managed by the Church’s Investment Committee, instead of the stock being sold, please contact a Church official.*

Essex Financial Services will sell the stock at the earliest possible opportunity.

A sincere “Thank you!” for your donation to the Church! You will receive a separate letter acknowledging your gift and detailing the amount turned over to the Church.

Should you have any questions about this transaction, please contact:

**Investment Committee of the First Congregational Church of Deep River**

**Tax ID #06-6038248**

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