



## STOCK TRANSFER INSTRUCTIONS

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Thank you very much for considering the contribution of stock to Saint Michael and All Angels.

### *Stock Gift Procedures:*

Please notify the Director of Finance, Rob Baber, as soon as possible once you have transferred stock with the name of the stock and number of shares.

Direct telephone: 214-365-3555  
Email: [rbaber@saintmichael.org](mailto:rbaber@saintmichael.org).

### *Transfer Instructions:*

Please have your broker wire transfer shares to:

Merrill Lynch  
Contact: Trent Owens 817-410-4934  
Contact: Haley King 817-410-3822

OTC (Depository Trust Company) #8862  
Account Name: Saint Michael and All Angels Episcopal Church  
Account Number: 7SL-04004

\*Note the alpha "SL" in the account number, these are not numbers. "S" as in Sierra and "L" as in Lima.

The finance department frequently reviews the stock account to verify gifts before shares can be sold to avoid any errors in transfers. As soon as the shares have been received and the gift is verified with the donor, the stock will be sold by the church. You will receive a stock gift letter after the transaction with the transfer information you may need for tax purposes.