



cherry creek pres

SECURITIES TRANSFER INSTRUCTIONS

Cherry Creek Presbyterian Church is pleased to accept stock gifts from members of the congregation. **Please contact your brokerage firm to verify the information they require to initiate the transfer.** Your broker will have a stock transfer form that you will need to complete and provide to them to initiate the transfer of stock to CCPC. **Please be aware that year-end transfer requests can take extra time for your broker to process. We suggest initiating the transfer as early as possible for gifts made in December.**

Here are the steps to follow to initiate a transfer of stock:

1. You will first need to complete a stock transfer request form for your broker. At a minimum you will need to supply the following information (please verify requirements with your brokerage firm):
 - Receiving Institution: Charles Schwab & Co.
 - Schwab account number – please contact one of the people listed below for this number.
 - Account Registration: Cherry Creek Presbyterian Church
 - Contact Name: Gary Hein
 - Telephone Number: 303-779-9909
 - Mailing Address: 10150 East Belleview Ave, Englewood, CO 80111
 - DTC Number: 0164
2. Please email a copy of the broker transfer request to: finance@cherrycreekpres.org.
3. After the transfer is complete you will receive a letter for tax purposes from the Finance department of CCPC which will include the name of the security, the number of shares, the date received, and market value based on the date of the transfer into our brokerage account.

If you have any questions about this process, please contact:

Lisa Enright, Finance Supervisor – (720) 722-5749, finance@cherrycreekpres.org
Gary Hein, Executive Pastor – (720) 722-5782, ghein@cherrycreekpres.org
Richard Staky, Treasurer – (303) 522-8628, rstaky@gmail.com

Please contact your tax advisor if you have any questions as to the tax treatment for a stock gift. CCPC cannot provide any advice to donors.

10150 E. Belleview Avenue ~ Englewood, CO 80111
ph 303-779-9909 ~ fax 303-779-4180 ~ www.cherrycreekpres.org