

# Gifts of Securities – Fidelity

Notify your broker/financial advisor that you wish to transfer the securities to Westminster. You will transfer IN KIND (this means you do not sell, but rather give in their current form) the securities you identify, directly from your account to the brokerage account in the name of Westminster Presbyterian Church.

Westminster has established a brokerage account with Fidelity through which your gift will be received. Your broker's office will want to know the following information in order to process your request:

- Fidelity DTC # 0226
- Fidelity Brokerage Services
- Brokerage Account #Z42-367117
- Westminster Presbyterian Church, Donna Harrison, Treasurer
- Westminster's Tax ID #23-1370437

Please also email or call with the details of the transfer to Donna at [dharrison@westminsterpc.org](mailto:dharrison@westminsterpc.org) or 610-399-3377 ext 112 alerting us to expect this gift so that we may promptly sell and acknowledge your generosity. Please include the following information:

- Your name and address
- Name of the stock or mutual fund
- Number of shares
- Expected date of transfer
- Purpose or intent of gift (ex. General Fund \$, Capital Fund \$ and/or other )