

# Gifts of Securities – Merrill Lynch

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 Merrill Lynch through which your gift will be received. Your broker's office will want to know the following information in order to process your request:

- Merrill Lynch DTC #5198
- Attn: Jennifer Hoey Exton, PA office
- Brokerage Account #878-04350
- Westminster Presbyterian Church
- 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
- Number of shares
- Expected date of transfer
- Purpose or intent of gift (ex. General Fund \$, Capital Fund \$ and/or other )

The valuation of the gift is calculated using the average of the high and low prices on the date of the gift, which is the day the security, is received into our brokerage account.