



**FIRST
CONGREGATIONAL
CHURCH** *of Essex Junction*

Love. Serve. Grow.

Senior Pastor
Rev. Mark Mendes

1 Church Street, Essex Junction, VT 05452

Phone: 802-878-5745

Email: welcome@fccej.org

Website: www.fccej.org

How to Make a Gift of Stock

Making a gift of stock to the First Congregational Church of Essex Junction is easy!

Individuals may transfer shares electronically into the Church's brokerage account, and then the Church's financial advisor will sell the stock on our behalf. The proceeds of the sale are not subject to capital gains tax.

Step 1: Contact Us!

If you would like to make a gift of stock, please first contact our Financial Secretary (finances@fccej.org) to notify the Church about your plans. AND please let us know what the donation is for (annual pledge, Endowment, Memorial Fund, Capital Campaign gift/pledge payment, other gift).

This is an important step because otherwise, we cannot know who has donated the stock to us (the brokerage firm sends a check to the church with only the company name/shares sold, but not the individual who donated them).

Step 2: Transfer Shares

Clearing Agent: Charles Schwab

DTC #: 0164

Assignee Account Registration: First Congregational Church

Assignee Account #: **6280-4901**

Questions? If you have any questions or would like help with this process, you may contact your own financial advisor, or contact:

Astrid Fernandez

Director of Client Services

Hammond Iles Wealth Advisors (financial advisor for the Church)

astrid@hiwealth.com

(860) 258 2600