

Instructions for Gifting Securities

(Stock, Bonds, Mutual Funds)

Please notify, and work with CCC Accounting on all transfers

- **If held in BROKERAGE OR STREET ACCOUNT (electric transfer):**

Write a **Letter of Instruction** to the brokerage or mutual fund company, as appropriate, to transfer either the number of shares, or a specific dollar amount to the Central California Conference of the Seventh-day Adventists (CCC) brokerage account.

Your stock or mutual fund company may require, depending on the rights and privileges established when your account was set up, a “Medallion” signature guarantee from a federal bank or brokerage company. In this case, don't sign your Letter of Instruction until your signature is witnessed at such an institution.

CCC account information for electronic transfer, is as follows:

Brokerage: First Clearing LLC
Account Name: Central Calif Conference Assoc.
CCC TIN #: 94-1279782
Account No.: 2058-3297
Address: 8405 N. Fresno Street, Ste 230
Fresno, CA 93720 Ph: (559) 437-3116 or (877) 368-4883; fax 559-432-8921
DTC No.: 141

- **If held as CERTIFICATE (paper transfer)**

Send a completed “Medallion” signature guaranteed Stock Power form to the stock company’s Transfer Agent, together with a Letter of Instruction naming the CCC as the transferee along with CCC’s address (shown below). If you can’t find the Transfer Agent, you may mail us the certificate and “Medallion” signature guaranteed stock power form for us to process. It is recommended that when mailing stock certificates, they be mailed certified, return receipt requested.

Note: Contact Treasury if you desire assistance with obtaining a stock power form, locating the current Transfer Agent and their location, or the contents of the Letter of Instruction.

General Instructions

Please write (or email) a **Letter of Instruction** to us. Donations may be restricted or unrestricted, to charitable entities within, or outside of Central Calif. Conference. Examples might be: Tithe, local church, local school, evangelism, foreign missions, etc. Distributions may be expressed in percentages, or dollar amounts. The process of transferring usually takes 10 days or 2 weeks before the shares are held, sold and cleared in our account. The sale price may be for more or less than the price as of the date of transfer. If dollar amounts are specified, we will notify you of the net sales proceeds realized and get your advice on the final and complete distribution. ***Please advise us if you wish the donation to be anonymous to the receiving institution(s).***

Please provide us your name, mailing address, social security number and date of gift. For IRS purposes the date of the gift is when irrevocably transferred (mailing of letter, or fax to your brokerage giving transfer instructions). CCC will provide you with the completed IRS Forms 8283 and 8282. You should not receive another (duplicate) receipt from other beneficiary institutions.

If you have any questions, please contact us,

Mayra Thompson, Treasurer

Central California Conference of the Seventh-day Adventists

Mailing address: P O Box 770, Clovis, CA 93613-0770 Street: 2820 Willow Ave., Clovis, CA 93612

Phone: (559) 347-3113; Fax: (559)347-3120

Email: Treasurer@cccsda.org