PINE GROVE
COMMUNITY CHURCH

Brokerage Transfer Instructions

Step 1: Obtain Transfer Instructions from the Church

- **Brokerage Firm Name:** Fidelity Investments ATTN: TOA
  PO Box 770001
  Cincinnati, OH 45277
- **Account Name:** Pine Grove Community Church
- **Account Number:** 638-368230
- **DTC Number:** 0226

It's important these details are exact to avoid any delays.

Step 2: Contact Your Brokerage Firm

Once you have the church's information, contact your brokerage firm (Schwab, Fidelity, Vanguard, etc.) and request an **in-kind charitable stock transfer**.
You will need to provide:

- The **number of shares** you wish to donate
- The **stock ticker symbol**
- The **church's brokerage instructions** (from Step 1)

Let them know clearly:
"I would like to transfer shares directly (in-kind) to the church's brokerage account."

Step 3: Initiate the Transfer

Your brokerage will process the transfer electronically and move the shares directly to the church's account (typically within a few business days).
Importantly, the shares are **not sold first**—they are transferred directly, which helps avoid capital gains tax on the appreciation.

Step 4: Notify the Church

After initiating the transfer, please notify the church BY EMAIL at financialpgcc@gmail.com
Include:

- Your name
- The stock and number of shares transferred

Brokerage transfers often do not include donor information, so this step ensures you receive proper credit and a tax acknowledgment.

A Few Key Reminders

- The value of your gift is based on the **market value on the date received**
- Completing the transfer before year-end is important for current-year tax reporting

For more information, contact:
Terry Drescher, Deacon over Church Finances
(715) 490-2438