

# MAKING A STOCK GIFT TO ST. MATTHEW'S

Giving is one way in which we express our gratefulness to God and provide an example of spiritual leadership. A gift of appreciated stock is a mechanism of giving to your parish, the Diocese, or another Diocesan institution which the Diocese is pleased to facilitate. Using the Diocesan account to donate shares of stock allows a gift to be made without the recipient having to establish a brokerage account on its own. Further, the lower commission structure the diocese commands results in a higher net gift to the recipient.

## **To make a stock gift through this program, there are two steps:**

### **1. Have your broker\* transfer your stock gift to:**

Davenport & Company, LLC

DTC #0443

Account #DA4001933

Davenport Contact: Marie Barté, (804) 780-2056

Diocesan Contact: Ted Smith

110 W. Franklin St.

Richmond, VA 23220

(804) 643-8451 x1046

*\* If your shares are held outside of a traditional brokerage, please contact Ted before initiating a transfer. Examples of these accounts include ComputerShare or DominionDirect programs.*

### **2. To ensure you are given proper credit for your gift, please send the following:**

- Notice to the Diocese from you stating:
  - The name of the brokerage you are instructing to submit your gift
  - The name and number of shares of the security you are giving
  - The date of the transaction
- If your gift is for the Diocese or another Episcopal organization (include name and city)
  - A gifting letter from your broker to the attention of Ted Smith, at the above address, verifying:
    - The name and number of shares of the security you donated
    - The date of the transfer

Thank you so much for participating in this program. If you have questions about your gift, please contact your diocesan Treasurer, Ted Smith, at (804) 643-8451 x 1046 or [tsmith@thediocese.net](mailto:tsmith@thediocese.net)