

Gifts of Stock

Transfer Instructions for making a gift of securities to WMU NC.

Gifts of appreciated securities are a smart and simple way to maximize the effectiveness of your charitable giving. If stocks you've held for more than a year have increased in value, you may want to consider using these assets – rather than cash – to fund your giving. By transferring ownership of your long-term stock to WMU NC you make a gift to support the ministry, avoid the capital gains tax you would pay if the stock were sold, and you may claim a charitable income tax deduction for the current fair market value of the asset.

Stock Transfer instructions:

- **DTC Transfer** – If you have your shares of stock in a brokerage account this is a convenient way to transfer your securities. Simply instruct your broker to electronically transfer your securities out of your account into WMU NC's E-Trade account and provide the account information below:
 - E-Trade Securities
 - DTC #0385, Code 40
 - Account #63971875
 - Title: Woman's Missionary Union of North Carolina

- **Certificate Transfer** – Transferring your certificate can be as easy as endorsing the back of the certificate and sending it by certified mail to WMU NC. You must sign the certificate in front of a bank officer to obtain a Medallion Signature Guarantee (notary public stamps are not an acceptable guarantor for stock certificates). Endorse the certificate exactly as your name(s) appears on the front. For example, if your certificate is listed as "Mary L. and Mark W. Smith", you will need to sign the certificate exactly as "Mary L. Smith" and "Mark W. Smith".
Next write WMU NC's tax identification number, 20-1190405, in the box on the back requesting a social security number or other identifying number of assignee. Mail the certificate by certified mail to:

WMU NC
Attn: Accounting
1200 Front Street, Suite 110
Raleigh, NC 27609

If you have any questions please contact the WMU NC office at (919) 882-2344 or email cdaniel@wmunc.org.