

DTC TRANSFER OF SECURITIES
INSTRUCTION SHEET for gifts to
Sardis Presbyterian Church

IMPORTANT

- 1) Please complete this form and forward it along with the DTC transfer instructions found on the bottom of this page **to your financial advisor.**
- 2) Please forward a copy of this form **to Transitions Wealth Management, LLC** via fax at 704-552-3917 as donor information does not always transmit through the DTC wiring system.

If you have any questions, please contact David Cauble at Transitions Wealth Management, LLC at 704-552-3919 or via email at dcauble@transitionswealth.com.

To [Donor(s)' Financial Advisor]: _____

Telephone: _____ Fax: _____

Please use this form as authorization to transfer the securities listed below from my account to LPL Financial as my gift to Sardis Presbyterian Church.

From [Donor(s) Name(s)]: _____

Address: _____

Telephone: _____ Fax: _____

<u>Number of Shares</u>	<u>Symbol</u>	<u>Name/Description of Security</u>	<u>Account Number</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Purpose of Gift (General Pledge, etc.): _____ Tax Year: _____

Signature(s): _____

Fax a copy of this form to the Business Administrator at Sardis Presbyterian Church, 704-364-0063.

DTC Wiring Instructions for Financial Advisors

For gifts of securities to Sardis Presbyterian Church, please deliver by DTC to:

LPL Financial DTC # 0075
For the account of Sardis Presbyterian Church
Account Number 3329-5342
Sardis Tax Identification Number 56-0597099

Please include: Donor's Name & Address, Name of Security & Number of Shares, and Gifting Purpose

Please note: In order to properly credit the gift, it is important that you reference the donor's name in the DTC transfer instructions.