

**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 704-323-7014 as donor information does not always transmit through the DTC wiring system.
3. Please forward a copy of this form to the Financial Administrator at Sardis Presbyterian Church in order to ensure that your gift is properly credited on your contribution.

If you have any questions, please contact David Cauble at Transitions Wealth Management, LLC at 704-272-1969 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>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Allocation Purpose (General Pledge, etc.): _____

Signature(s): _____

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.