



## STEP 1 - TRANSFER STOCK

### **BY ELECTRONIC TRANSFER**

Provide your broker or financial adviser with the following information:

- **Account Name:** First Presbyterian Church of Houston
- **Account Number:** 13451541
- **DTC #** 0725
- **Tax ID #**74-1180189

Make sure that your name, address, and account number are included in the transaction to Raymond James & Associates.

### **BY MAIL (STOCKS IN YOUR PERSONAL POSSESSION)**

Mail the following by tracked or registered mail system (e.g. FEDEX, Registered Mail) to:

**Raymond James & Associates**  
500 Dallas Street Suite 3400  
Houston TX 77002  
Attn. Donna Bergier

### **ITEMS TO MAIL**

- Stock Power - sign & date at the bottom (See below)
- Authority to Deposit Securities – sign under client signature (See below)
- Stock Certificates

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## STEP 2 - NOTIFY FIRST PRESBYTERIAN CHURCH OF HOUSTON

To insure proper crediting of your stock donation, please have your broker or yourself contact Eva Garcia in the Finance office at 713.620.6482 or via e-mail to [contributions@fpchouston.org](mailto:contributions@fpchouston.org) to notify us that the transfer is underway.

Be prepared to provide the following information:

- Date of stock transfer
- Number of shares
- Name of stock
- Correct spelling of your name
- Your complete mailing address

Acknowledgement will be made in compliance with IRS regulations by FPC, please consult with your tax advisor before making a charitable donation to any charity. The legal gift date for securities electronically transferred is the day they are received in our account. The legal gift date for certificates that are mailed is determined by the postmark date on the envelope.

# Irrevocable Stock or Bond Power

**RAYMOND JAMES**

& ASSOCIATES, INC.

Member New York Stock Exchange/SIPC

880 Carillon Parkway  
St. Petersburg, FL 33716

25900 Telegraph Road  
Southfield, MI 48034

0 1 0 4 6

Form #

Account #

Branch #

FA #

Speed Dial #

Name: \_\_\_\_\_

For value received, the undersigned does (do) hereby sell, assign and transfer to

\_\_\_\_\_  
\_\_\_\_\_

(Social Security or Taxpayer Identifying No.)

\_\_\_\_\_ shares of the \_\_\_\_\_ **stock** of \_\_\_\_\_

represented by Certificate(s) No.(s) \_\_\_\_\_ inclusive, standing  
in the name of the undersigned on the books of said Company.

\_\_\_\_\_ **bonds** of \_\_\_\_\_

in the principal amount of \$ \_\_\_\_\_ . No.(s) \_\_\_\_\_ inclusive, standing  
in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint **Raymond James & Associates**  
attorney to transfer the said stock or bond(s), as the case may be, on the books of said Company, with full power of substitution  
in the premises.

Dated \_\_\_\_\_

**Sign Here:** \_\_\_\_\_

\_\_\_\_\_

# Authority to Deposit Securities



**Custody  
Service Center  
Scan or Fax 866-406-4232**

<b>01087</b>	
Form #	Account #
Branch #	FA #
	Speed Dial #

## Deposit to Account

Name on Account _____	Certificate Registration (if different from name on account) _____
Relationship (to registered certificate holder) _____	Address _____
<b>If registered certificate holder is not an RJ client:</b>	City _____ State _____ Zip _____
In what country does the registered certificate holder reside? _____	
Is the registered certificate holder a U.S. Citizen? <input type="radio"/> Yes <input type="radio"/> No, Country of Citizenship: _____	

## Securities Transfer Details

**If transferring a portion of a multi-tax lot position, a FIFO method will be used unless otherwise specified.**  
(Provide details below)

Quantity/Amount	Symbol/Description	Certificate #

## Cost Basis Instructions

**Select One:**    Non-Gift / Non-Inheritance / Spousal Transfer  
 Gift (Gift rules will be applied)  
 Inheritance - Provide Date of Death: \_\_\_\_\_    Alternate Valuation Date

Please specify the amount of the step-up (e.g. 100% or 50/50): \_\_\_\_\_ %

## Acknowledgments and Signatures

I/We hereby relinquish all right, title and interest in said transferred securities, and release and discharge you of any claims by me or my legal representatives with reference thereto, including the proceeds from the sale or other disposition thereof. I/We agree to hold Raymond James & Associates, Inc., harmless from any loss or claim which may be incurred by reason of this transfer of funds and/or securities to the account(s) as stated above.

Client Signature	Date	<b>Medallion Stamp Guarantee</b>
Client Signature (if applicable)	Date	
Branch Manager Approval	Date	