



HOW TO MAKE A STOCK OR MUTUAL FUNDS DONATION

(This form is available on St. Mark's web site, <http://www.stmarks.net/about/financial.html>.)

Many parishioners opt to fulfill their pledges and make donations to other St. Mark's funds by transferring gifts of stock or mutual funds to the parish. If you would like to do so, here's how:

FOR A DONATION OF STOCK:

1. Please instruct your broker to deliver the stock shares to:
Deutsche Bank Securities (DTC # 443)
Account Name: St. Mark's Episcopal Church
Account Number: 5XW150704
2. Please ask your broker to put your name on the transfer if at all possible. (Please note, however, that it is usually NOT possible to do this, given the transfer software used by most brokers.)
3. Please contact, Susan Block, the Parish Administrator, at 202-543-0053 x 305 or susan.block@stmarks.net, with the following information:
 - (a) Your name and phone number
 - (b) The name of your brokerage house
 - (c) The date the stock is to be transferred to St. Mark's account
 - (d) The name of the stock and the number of shares you are transferring
 - (e) The approximate dollar value of the stock
 - (f) The purpose of your donation (*i.e.*, is it to fulfill this year's pledge, last year's pledge, or to go to another fund)

It is vital that you notify St. Mark's of your transfer. Every year the church receives gifts of stock for which the donor is unidentified. As noted above, most brokerage houses cannot include your name in the paperwork that accompanies and effects stock transfers. Nor is Deutsche Bank able to determine the donor by calling the brokerage house after the transfer is made. If you do not notify St. Mark's of your gift, it may be lost.

FOR A DONATION OF MUTUAL FUNDS:

1. Please contact Rex Wagner, St. Mark's account executive at Deutsche Bank Alex. Brown (202-626-7007 or toll free at 800-326-1440), or his associate, Diana Tomaro (202-626-7006) for instructions. Please note that every mutual funds transfer differs, depending on where the funds are held.
2. ***Please note that it can take up to 2-3 weeks to effect a mutual funds transfer.***
3. Finally, please contact Susan Block, the Parish Administrator, at 202-543-0053 x 305 or susan.block@stmarks.net, and tell her that you intend to donate mutual funds to St. Mark's. ***It is vital that you notify St. Mark's of your donation to help insure that your gift is received and accurately credited to you and to the fund to which you wish to donate. If you do not notify St. Mark's of your gift, it may be lost.***

If you have any questions about the above please call:
Susan Block, the Parish Administrator, at 202-543-0053 ext. 305

OR

Rex Wagner, St. Mark's account executive at Deutsche Bank Alex. Brown (202-626-7007 or 800-326-1440)
or his associate, Diana Tomaro (202-626-7006)