

Procedures to follow for a Gift of Stock to Hanover Evangelical Friends Church

For stock certificates given directly to HEFC:

1. The contributor writes a **Letter of Authorization** to HEFC that states the following:
 - a. The name of the stock that is being gifted
 - b. The number of shares being gifted
 - c. The date the gift is being made
 - d. The gift is being made to HEFC and that permission is granted to deposit the shares into the HEFC account
2. The contributor delivers the following to HEFC or to Scottrade Inc (see address below):
 - a. Signed Certificate(s) for the stocks being gifted
 - b. The signature(s) must match the name(s) on the front of the stock certificate(s)
 - c. A signed **letter of Authorization** (see sample)
3. If the stock certificates are given to HEFC, then the authorized agent for HEFC (usually a member of the Stewardship Commission) delivers the following to HEFC's broker by mail or in person:
 - a. The contributor's **Letter of Authorization**
 - b. The stock certificate(s)

Local broker contact information for HEFC:

Scottrade, Inc.
4028 Cox Road
Glen Allen, VA 23060
Phone: 804-270-7040

For shares that will be electronically delivered to HEFC's brokerage account:

1. The contributor writes a **Letter of Authorization** to HEFC that states the following:
 - a. The name of the stock that is being gifted
 - b. The number of shares being gifted
 - c. The date the gift is being made
 - d. The gift is being made to HEFC
2. The contributor contacts his/her broker at least 48 hours prior to the date of transfer to instruct them as to where to transfer the stock. The following information should be used to accomplish the transfer:
 - a. Who will receive transfer: Hanover Evangelical Friends Church
 - b. HEFC account number: 37591307
 - c. DTC #: 0705 Scottrade Inc.

NOTE: The contributor can also contact Scottrade Inc. at 804-270-7040 to execute this electronic transfer.

3. HEFC acknowledges the following:
 - a. Receipt of the securitie(s)
 - b. Value of the securitie(s)
 - c. Date of receipt

NOTE: This document is specific to Scottrade, Inc. which is the brokerage firm currently used by HEFC. If HEFC changes to a new brokerage firm in the future, this document should be updated to reflect the new addresses and account numbers.