

# INFORMATION ON STOCK TRANSFERS TO THE DIOCESE OF OLYMPIA, ITS MEMBER CONGREGATIONS, AND OTHER EPISCOPAL MINISTRIES

Thank you for your interest in giving a gift of stock to support the ministry of the Episcopal Church. For more information about including the church in your will or estate plans, contact the Stewardship & Development Office at 206-325-4200 or [stewardship@ecww.org](mailto:stewardship@ecww.org).

## How to Give a Gift of Stock

When giving a gift of stock, a letter of instruction (see sample below) must be sent to **three** places: Your broker, Diocese of Olympia broker D.A. Davidson, and the Diocesan Stewardship and Development Office. The letter should indicate the church, program, or ministry you wish to support.

This is a very important step that will allow us to watch for your gift and send the sale proceeds to your designated church, program, or ministry as quickly as possible!

### SAMPLE LETTER:

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Your Name  
Your Return Address  
Your Phone Number  
Your Email

Date

Inside address (to your broker)

Dear (your broker):

Please transfer (**number**) shares of (**Name of company**) stock ("**ticker**" **symbol**) from my account (**brokerage or custodial account number**) to the Episcopal Diocese of Olympia, Inc. account # 20012484 at D.A. Davidson & Co., DTC #0361.

If you have questions, contact the assistant to the broker for the Diocese of Olympia at:

D.A. Davidson & Co.  
Attn.: Mike Franz  
1300 SW 5th Ave Ste  
1950 Portland, OR 97201  
(503) 267-9326  
Or [mfranz@dadco.com](mailto:mfranz@dadco.com)

The Tax ID of the Diocese of Olympia, Inc. is 91-0200430, located at:

Diocese of Olympia, Inc.  
Attn: Stewardship and Development  
1551 Tenth Ave E  
Seattle, WA 98102

This gift is for the benefit of (congregation or program) in (city and state) for the following purpose(s):

Sincerely,

(Signature in full)  
Type your full name

Cc: Mike Franz, D.A. Davidson & Co., 1300 SW 5th Ave Ste 1950, Portland, OR 97201 and  
Diocese of Olympia, Stewardship and Development Office, 1551 Tenth Ave E, Seattle,  
WA 98102

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The Stewardship and Development office will send you a letter or email letting you know that we have received your instructions. Please note that it will take some time after you have sent this letter for the sale to be completed. Once the sale has been completed, the proceeds of the sale will be sent to the congregation/program you instructed and a receipt letter will be sent to you.

#### DIOCESAN POLICY ON SALE OF DONATED SECURITIES

The Board of Directors of the Diocese of Olympia has adopted a policy to sell gifts of securities as soon as they are received. **There may be a delay that can change the value of the stock and the gift from its value when it was donated.** This may affect the amount available to the parish or program you designate.

Please follow the applicable local and federal laws for securities and taxes in conjunction with the advice of your broker and accountant. We are happy to fill in the donor information portion of any tax forms you wish to submit to us.