

## Redlands United Church of Christ: Instructions for Security Donations

Thank you for supporting RUCC with a gift of securities<sup>1</sup>. Giving stocks involves just two steps:

### Step 1: Inform RUCC you intend to make a gift:

It is important to inform RUCC, United Church Funds and the BNYMellon account officer that the gift will occur and that it should be credited to the RUCC account at UCF #041110. This can be done with a single email to [stockdonation@uccredlands.org](mailto:stockdonation@uccredlands.org). Please indicate in the email the name, symbol and number of the security being transferred. If you have questions, please contact the RUCC treasurer at [treasurer@uccredlands.org](mailto:treasurer@uccredlands.org)

**Sample email:** Dear Sir or Madam, I have initiated a transfer of 200 shares of Parnassus Core Equity Fund (PRBLX) to the United Church Fund account N7M001442 from my Schwab account. This gift is intended for Redlands United Church of Christ (UCF account #041110). Half of the money should go towards my annual pledge and the rest should be placed in the Building Fund. Please contact me if there are any questions.  
Regards, RUCC Donor

### Step 2: Transfer the Securities:

Authorize your broker or financial agent to transfer shares to the RUCC investment account with the United Church Funds (UCF). Gifts need to be made to the United Church Funds and transferred to The Bank of New York Mellon (BNYMellon) using the account details below.

**DTC Eligible Securities** (use for  
stocks and most mutual funds)  
DTC #0443  
Pershing, LLC  
500 Grant Street  
Pittsburg, PA 15258  
(412) 234-0439  
For Credit to account #N7M001442  
Client account name: United Church  
Funds

**Fed Eligible Securities**  
ABA# 021-00-018  
Bank of NY/Pershing  
For Credit to account #N7M001442  
Client account name: United Church  
Funds

Please contact Jorja Watts at 412-234-0439 or [jorja.watts@bnymellon.com](mailto:jorja.watts@bnymellon.com) for any questions, for additional instructions on transferring physical securities, and to determine if a particular mutual fund can be transferred.

<sup>1</sup>There are tax advantages to giving away long term appreciated securities, rather than liquidating the stock and giving a cash donation from the proceeds. Please consult your tax or financial advisor about these benefits.