



1151 N. Saint Mary's Road,
Libertyville, Illinois 60048-1575

Tel: 847-367-4060

Fax: 847-367-4346

holycrosschurch.org

Instructions for donating securities to Holy Cross Lutheran Church

Generally speaking, any donations made in marketable securities, directly to the Church will credit the donor with a donation based on the market value of the securities at the time of transfer without any tax consequences for appreciation of the security donated.

Holy Cross utilizes FIRSTRADE as our investment broker.

MAKING A STOCK DONATION:

Contact your brokerage firm, and instruct them to transfer your donated whole shares to:

FIRSTRADE

DTC# 0158

For the account of:

HOLY CROSS LUTHERAN CHURCH

1151 N. Saint Mary's Rd.

Libertyville, IL 60048

FIN: 36-3106864

Acct#: 49860482

MAKING A MUTUAL FUND DONATION:

Mutual Funds are a little different from Stocks.

In order to transfer mutual funds directly to the Church, Firstrade requires the Church to issue a Letter of Acceptance to Firstrade before the transfer is made. The Letter of Acceptance must include the following details from the donor:

1. Name of Donor
2. Name of mutual fund and number of shares being donated
3. Name of financial institution of transferor

Please send this information to the financial secretary email noted below.

After the Letter of Acceptance is confirmed by Firstrade, the shares can be transferred directly to Firstrade using an ACAT-Transfer method. Your broker or financial advisor should be familiar with this method.

For ALL DONATIONS, please notify the Financial Secretary and the Director of Engagemant & Generosity of the Church and let us know the name of the security, the number of shares, and the date you expect the transfer to be made. And, most importantly, we need to know what purpose you would like your donation to be used for.

It is the Church's policy that all securities received as donations be sold as quickly as possible. As a donor, you will be credited on your annual statement for a donation equal to the average of the high and low trading points for the day of transfer.

If you have any questions or concerns, please contact us at the below numbers/emails.

And THANK YOU for supporting the ministry of Holy Cross Lutheran Church.

Thomas Miller
Financial Secretary
FinSec@HolyCrossChurch.org
Mobile: 224-381-0116

Steve Oelschlager
Director of Operational Ministries
Steve@HolyCrossChurch.org
Church Office: 847-367-4060

Last Update: April 16, 2021