

Name of Policy:	Making Gifts of Securities
Date:	Sept. 14, 2009
Last Update:	July 15, 2015
Reason for Update:	Change in broker
Applicable Forms	N/A
Procedure approved by:	Finance Committee vote, July 8, 2015 & Session Approval July 15, 2015

General: Trinity Presbyterian works closely with a local financial advisor to process your securities gifts. The intent of this Policy is to provide both general and specific directions for you to follow depending on your needs. Please contact our financial advisor in advance of your transaction to confirm instructions.

Procedures: Electronic Transfers. In general, when securities are held by your bank or broker, you make the transfer to the church electronically through the Depository Trust Co. (DTC) system. Please contact the Trinity Presbyterian Financial Secretary prior to making a transfer and communicate the name of the stock, and the number of shares to be transferred. This is important so the church is able to recognize you as the donor and monitor the timeliness of the transaction. **Year-end Transfers:** If you intend to make a securities gift prior to the end of the calendar year, you must take into consideration the time necessary to process your transaction. Trinity suggests that you begin to initiate your transfers by **December 10** to allow sufficient time to process your gift. Transaction time for gifts of mutual fund units may take several weeks. Please contact the Financial Secretary regarding your end-of-year gift **as soon as possible before year end.**

Sending Stock Certificates by Mail or Hand Delivery. If you possess securities in certificate form, you need to deliver the securities to our financial advisor, The Trust Company of Kansas. They will require a signed stock power (see attached) for each certificate. **DO NOT ENDORSE** the stock certificate; the stock power must be "Medallion-Stamped" by a certified bank officer. Please do NOT complete the sections on the stock power indicating the name of the stock, number of shares and certificate numbers—any errors will cause the gift-transaction to be rejected so it is better to leave those fields blank. We request you contact The Trust Company of Kansas directly for more detailed instructions. In the event your broker cannot assist you, our financial advisor can provide you with the requisite Medallion-Stamp.

For Local Service:

The Trust Company of Kansas Contact: Dan Brogren, CTFA

730 New Hampshire St, Ste 205

Lawrence KS 66044-2776

Tel: (800) 749-0904

Cell: (785) 640-4811 [Topeka]

If stock is held in a brokerage account, send it via DTC:

DTC Participant #901

Acct #335260, Acct Name The Trust Company of Kansas

FFC: Trinity Presbyterian Church, #1107301D