



Church of the Palms

STOCK TRANSFERS

The following will assist you with transfer of stock to the church. We ask that you contact the church Finance Dept. directly at 941-921-1323 or via the following email addresses **PRIOR** to initiating your stock transfer:

- kkenny@churchofthepalms.org
- wghezzi@churchofthepalms.org

In order to enable the church to properly receive and direct your stock gift, the following information should be communicated to the Finance Dept.

- Your Name, Phone Number and email address
- Name of Stock (and/or Symbol) being transferred
- Approx. number of shares to be transferred
- Approx. date of transfer
- Instructions of how or where to direct your gift (i.e. annual giving, specific ministerial fund, etc.)

Having the above information will enable the church to properly identify your transaction and direct your gift in a manner that is consistent with your intent.

Once the Finance Dept. receives the above information, you will be provided with all the necessary brokerage information which can be passed along to your broker/financial advisor which will be needed to complete your transaction.