



STOCK TRANSFER INFORMATION FOR GIFTS TO CHURCH OF THE PALMS

Church Information:

3224 Bee Ridge Road

Sarasota, FL 34239

941-924-1323

Federal Id. #59-0995240

Contact: Terry Lamberson, tlamberson@churchofthepalms.org Phone: 941-924-1323, ext. 239

Church Broker Information:

USB Financial Services, Inc.

1819 Main Street, #900

Sarasota, FL 34236

Contact Eric Dunn Direct Line: 941-364-7215

If Eric is not available, contact Dee Brenner Direct Line: 941-364-7239

Church of the Palms Account #HW08339

DTC #0221

When transferring a gift of stock to the church, please email Terry at tlamberson@churchofthepalms.org and let him know the gift is being transferred, the name of the stock and the number of shares. Also, please let him know how to credit the gift (operating fund, food pantry, etc.).