



# Stock Donations

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**New Albany Presbyterian Church also accepts stock donations. If you would like to donate stock, which NAPC will convert to cash, please follow these steps:**

- Complete the Stock Donation Form and submit it to Maxwell Financial (attention Adam Hill) to start the process. [ahill@maxwellfm.com](mailto:ahill@maxwellfm.com)
- Next, you will need to notify your financial institution/agent that the transfer is being made via Maxwell Financial.
- Once the transfer has been executed and completed, you should receive a confirmation from your financial institution/agent that the transfer to Maxwell has taken place.
- Please notify the church office of your intent to transfer the stock, including: the type and number of shares being transferred, the current value of the shares and the date the transaction occurred. Please DO NOT send any of your personal account information or the Stock Donation Form to NAPC.
- You will receive a notification from NAPC upon receipt, including the net amount of the stock and the date upon which it was received.

**\*NOTE:** While NAPC prefers to use Maxwell Financial as the clearing agent to maintain a consistent process, you are certainly welcome to make your own clearing arrangements. Simply contact the church's Administrative Manager for assistance.



**NEW ALBANY PRESBYTERIAN CHURCH**  
**STOCK DONATION INSTRUCTIONS**

Thank you for your interest in making a charitable gift in the form of a stock donation to the New Albany Presbyterian Church. The church maintains a brokerage account with FSC Securities for the purpose of processing stock transfers for the benefit of Operating Fund. Gifts of stock may be made via electronic transfer or you may deposit certificates at our office.

If you should have any questions about this process, please call Adam Hill or Heather Smith at 614-431-4345.

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**PLEASE PROVIDE ALL INFORMATION REQUESTED:**

Notice of Stock Donation:

Name:

Name of stock shares donated:

Signature:

Date:

Please apply my gift towards the following fund:

Operating Fund

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Please send copies of pages 1&2 to Heather Smith at Maxwell Financial Management as the first step of the transfer process:

Maxwell Financial Management  
6530 West Campus Oval  
Suite 320  
New Albany, OH 43054

Phone: (614)431-4345  
Fax: (614)304-0091  
Email: hsmith@maxwellfm.com

6530 West Campus Oval, Suite 320 • New Albany, Ohio 43054  
Phone: (614) 431-4345 • Fax: (614) 304-0091 • www.maxwellFM.com

## TRANSFER INSTRUCTIONS FOR STOCK DONATIONS

### If a donor physically has the stock certificate(s):

- I. You can deliver your stock certificate and an executed stock power to the church office. The church office will forward it to Maxwell Financial Management who is administering this account.

**OR**

- II. You may send by registered mail, your unsigned stock certificate and the executed stock power to the following address:
  - a. Maxwell Financial Management  
Attn: Adam Hill, President  
6530 West Campus Oval  
Suite 320  
New Albany, OH 43054

### If the stock certificate or shares are held by a brokerage firm or financial institution, this information will be needed.

- I. The broker for the church is:
  - a. Adam Hill  
FSC Securities  
6530 West Campus Oval  
Suite 320  
New Albany, OH 43054
- II. Pershing is the transfer agent for FSC Securities. The DTC # for Pershing is **0443**
- III. The official name of the church account at FSC Securities is:
  - a. New Albany Presbyterian Church  
Operating Fund  
Account #: 3MD391552