



CHRIST CHURCH
SIERRA MADRE

DONATION OF SECURITIES FORM

Benefits of Donating Securities

- No Long-Term Cap Gain tax
- Tax deduction for the full market value

Donating is Easy

1. To alert us that securities are coming, simply fill out this form and mail it to the address below or email it to **info@christchurchsm.org**.
2. You can complete your brokerage's Security Donation Form with our account information below or contact our Financial Advisor, Scott Sommers at First Financial Consulting – (626) 484-1492, email - scott@firstfinancial.is
3. Once we receive the securities and this form, our business team will send you an official letter for your tax purposes. This letter will include the number and type of shares and the date the securities were received.

Account Name and Address: Christ Congregational Church of Sierra Madre, 170 W. Sierra Madre Blvd., Sierra Madre, CA 91024
CCSM Broker Information: Charles Schwab – Schwab One Account
CCSM Account Number: 3657-8448
DTC Number: 0164
CCSM Tax ID Number: 95-1758198

Personal Information	
First and Last Name:	
Address:	
Phone:	Email:

Securities Information	
Date of Transfer:	Number of Shares:
Name of Security:	Security Symbol:
Your Broker Firm Name:	

All contributions are tax-deductible. The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules.

Thank you for your interest in gifting securities to Christ Church Sierra Madre.