



FPC HOUSTON

STEP 1 - TRANSFER STOCK

BY ELECTRONIC TRANSFER

Provide your broker or financial adviser with the following information:

- **Account Name:** First Presbyterian Church of Houston
- **Account Number:** 13451541
- **DTC #** 0725
- **Tax ID #**74-1180189

Make sure that your name, address, and account number are included in the transaction to Raymond James & Associates.

BY MAIL (STOCKS IN YOUR PERSONAL POSSESSION)

Mail the following by tracked or registered mail system (e.g. FEDEX, Registered Mail) to:

Raymond James & Associates
500 Dallas Street Suite 3400
Houston TX 77002
Attn. Donna Bergier

ITEMS TO MAIL

- Stock Power - sign & date at the bottom (See below)
- Authority to Deposit Securities – sign under client signature (See below)
- Stock Certificates

STEP 2 - NOTIFY FIRST PRESBYTERIAN CHURCH OF HOUSTON

To insure proper crediting of your stock donation, please have your broker or yourself contact Frances Rivera in the Finance office at 713.620.6482 or via e-mail to contributions@fpchouston.org to notify us that the transfer is underway.

Be prepared to provide the following information:

- Date of stock transfer
- Number of shares
- Name of stock
- Correct spelling of your name
- Your complete mailing address

Acknowledgement will be made in compliance with IRS regulations by FPC, please consult with your tax advisor before making a charitable donation to any charity. The legal gift date for securities electronically transferred is the day they are received in our account. The legal gift date for certificates that are mailed is determined by the postmark date on the envelope.

Irrevocable Stock or Bond Power



**Service Center
Scan or Fax**

0 1 0 4 6

Form #

Account #

Original to Custody

Branch #

FA #

Speed Dial #

Remittal Information

- Scan or fax a copy of form #1046 into Service Center.
- Return the original completed form to one of following remittal options.

Mail Original: Raymond James Attn: Custody Department 880 Carillon Parkway St. Petersburg, FL 33716	or	Raymond James Attn: Custody Department 25900 Telegraph Road Southfield, MI 48033
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Note: Delivery will be deemed to be made only when Raymond James Custody Department actually receives the original signed form.

Transfer Details

Raymond James Account Name: _____

For value received, the undersigned does hereby sell, assign and transfer to:

Stock or Bond inclusive, standing in the name of the undersigned on the books of said Company.

Quantity/ Principal Amount	Name of Stock/Bond	Certificate/Bond Number(s)	Type (if applicable)

Acknowledgments and Signatures

By signing below, I/We hereby irrevocably constitute and appoint Raymond James & Associates, Inc. attorney to transfer the said stock or bond(s), as the case may be, on the books of said Company, with full power of substitution in the premises.

Signature	Date	Signature (if applicable)	Date
Print Name	Print Name		

Reset

Print

Authority to Deposit Securities



**Custody
Service Center**
eSign / Scan / Fax

01087

Form #

Account #

Branch #

FA #

Speed Dial #

Deposit to Account

Name on Account	Certificate Registration (if different from name on account)
Relationship (to registered certificate holder)	Address
If registered certificate holder is not an RJ client:	City State Zip
In what country does the registered certificate holder reside?	
Is the registered certificate holder a U.S. Citizen? <input type="radio"/> Yes <input type="radio"/> No, Country of Citizenship: _____	

Securities Transfer Details

If transferring a portion of a multi-tax lot position, a FIFO method will be used unless otherwise specified.
(Provide details below)

Quantity/Amount	Symbol/Description	Certificate #

Cost Basis Instructions

Select One: Non-Gift / Non-Inheritance / Spousal Transfer
 Gift (Gift rules will be applied)
 Inheritance - Provide Date of Death: _____ Alternate Valuation Date
 Please specify the amount of the step-up (e.g. 100% or 50/50): _____ %

Acknowledgments and Signatures

I/We hereby relinquish all right, title and interest in said transferred securities, and release and discharge you of any claims by me or my legal representatives with reference thereto, including the proceeds from the sale or other disposition thereof. I/We agree to hold Raymond James & Associates, Inc., harmless from any loss or claim which may be incurred by reason of this transfer of funds and/or securities to the account(s) as stated above.

Client / Shareholder Signature	Date	Medallion Stamp Guarantee
Client / Shareholder Signature (if applicable)	Date	
Branch Manager Approval	Date	