



**Three Easy Steps** to make a charitable gift of securities to the church.

1) **Contact your Broker.** They have a specific form (often called a 'partial transfer/gift form') you will need to complete in order to transfer the securities to the church.

2) **Provide your Broker** with the information below. This information is used to complete their form and tells them where to send the securities.

- Receiving Brokerage Firm Name: Fidelity Investments (National Financial Services)
- Receiving Brokerage DTC Number: 0226
- Receiving Account Registration: First Presbyterian Church of Allentown
- Receiving Account Number: WA8-113228
- Receiving EIN Number: 23-1352423
- Receiving Brokerage Advisor: Doug Leonzi (610-882-5376)
- Broker Points of Contact: Richard A. Lord (484-795-7670)  
Alta Tyminski ( 610-674-1170)
- Receiving Broker Address: 645 W. Hamilton Street, 10<sup>th</sup> Floor, Allentown, PA 18101
- Receiving Account Contact:  
Tara Drayer, Staff Accountant  
First Presbyterian Church of Allentown  
3231 W. Tilghman Street, Allentown, PA 18104  
Tel: 610.395.3781  
Email: [tara.drayer@fpcallentown.org](mailto:tara.drayer@fpcallentown.org)

3) **Notify the church of your gift.** (Notify Tara Drayer at 610.395.3781)

THIS IS VERY IMPORTANT. We need to know the gift is coming in order to track receipt of the securities, and to give proper acknowledgement of the gift. Here is what we need to know:

- Your Name
- The name of your brokerage firm sending the securities
- The name of your financial advisor
- Your financial advisor's phone number
- The type of security being gifted (e.g. stock, bond, or mutual fund)
- The name of the security (e.g. IBM stock; Fidelity Growth Fund)
- How many shares, or units, of the security are being gifted
- Is your gift for the FPCA Endowment Fund, or your Annual Giving Pledge?

**FYI – About 'Medallion Signature Guarantees'** – Some brokerage firms require them to be added to their paperwork. Generally a 'Medallion Signature Guarantees' can be obtained from your local bank. Bringing in:

1.) A copy of your statement that shows ownership of the investments you are gifting to the church. 2.) Bring with you a photo I.D., and 3.) Sign the Gifting form in front of the individual who will apply the Medallion Signature Guarantee to the form.

**If you have any questions**, please contact Tara Drayer at 610.395.3781, or email at <mailto:tara.drayer@fpcallentown.org>

**THANK YOU FOR YOUR GENEROUS GIFT!**