How to Donate Stock or Mutual Funds to St. Luke’s Episcopal Church

Donating securities (i.e., stocks or mutual funds) to St. Luke’s is a two-step process:
1) Work with your current investment house or broker to send the gift, and
2) Notify St. Luke’s to look for the gift to ensure prompt processing of your donation.

Step One: Send the Gift

The organization that currently holds the securities will have a form for you to complete for donations of charitable gifts. You will provide the information about your account and the stock(s) or mutual fund(s) you wish to donate. Additionally, you need to specify the following information about St. Luke’s as the recipient of your donation:

- Organization Name and Account Registration: SAINT LUKES EPISCOPAL CHURCH
- Tax I.D. Number:  52-0681145
- Receiving Firm Clearing Number (DTC): 0443
- Receiving Firm Account Number: 6MX025387
- Receiving Firm or Receiving Institution: Pershing LLC
- Contact name at Charitable Organization: Arlene Antonicelli
- Organization Information: St. Luke’s Episcopal Church, 6030 Grosvenor Ln, Bethesda, MD 20814, (301) 530-1800

Step Two: Notify St. Luke’s

Typically (and unfortunately), when stock or mutual fund donations are transacted, the securities are transferred into the account directly from one firm to the other, and often do not include the name of the actual donor. In order to ensure proper crediting and processing of your donation, please do the following:

- Forward a copy of the form completed in Step One to Arlene Antonicelli (the St. Luke’s Financial Contributions Officer) at: contributions@stlukesbethesda.org
- Also send a copy of the form to Marilynn (she works with our investment advisor) at: Marilynn@finadvinc.com
- Alternatively, you may send an email to Arlene Antonicelli at: contributions@stlukesbethesda.org, stating the name of your brokerage, the name of the stock/fund(s) being transferred, the number of shares, and the expected date of the transfer.

Our investment advisor will notify us when the gift arrives, and we will work with the folks at Financial Advantage to determine the correct tax reporting and donation information. A letter or email confirming the donation and tax information will be sent to you, and the information will also appear on your contribution statement.
Please contact Arlene Antonicelli at contributions@stlukesbethesda.org if you have any questions.

As of 03/10/2017