



CONNECT. GROW. SERVE.

Donating Stock to Bethel Lutheran Church

Dear Members and Friends of Bethel,

Thank you for your interest in donating stock to Bethel. For many people, donating stock is a tax effective way to give. If you have any questions about the process, please contact the church office and we will be glad to assist you!

Important: As you begin the transfer process, please contact Cheri Monette in the Bethel Downtown office (715-386-8821 or cherim@bethelhudson.org) so that she is aware of the stock transfer. She will need the following information in order to identify your donation and ensure it is credited to your Bethel member number:

1. Your name: _____
2. Stock name or symbol: _____
3. Number of shares: _____
4. How should this donation be used?
 - Regular church operations (pays for youth and adult ministries, monthly expenses, etc.)
 - Capital fund (pays off debt and used to make major capital repairs)

Please provide the following information to your brokerage firm.

Stock Transfer Information

Pershing LLC is the brokerage or clearing house in Jersey City.

The dealer transfer number: DTC #0443

Funds are then transferred from Pershing to CPR Wealth Advisors (Investment Centers of America) in Hudson.

Bethel's account number at CPR Wealth Advisors: #4PW 173787

If needed, Bethel's tax ID number is: 39-0963084