

## 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 Ralph Van Keulen in the Bethel Downtown office (715-386-8821 or [rvankeulen@bethelhudson.org](mailto:rvankeulen@bethelhudson.org)). He will need the following information to ensure your gift 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

The instructions below are NEW as of December 1, 2017

LPL Financial is the brokerage or clearing house.

***The LPL Financial dealer transfer number: DTC #0075***

Funds are then transferred from LPL Financial to CPR Wealth Advisors in Hudson.

***Bethel's account number at CPR Wealth Advisors: 34746080***

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