

# Steps to Completing Your Security Gift



## Gifts of Securities

Thank you for prayerfully deciding to contribute stocks, bonds, mutual funds or another marketable security. We are honored to serve you and work together to further God's kingdom through your generous gift.

To get the process started, please complete steps 1 and 2 below. Your broker and Orchard Alliance will then take it from there to ensure your security is properly and efficiently made available for the charitable purposes you designate.

### STEP 1

Fill out the attached form "Security Gift Form" and return it to Orchard Alliance at the address below.

### STEP 2

Give a copy of the bottom part of the form to your broker, as it has the transfer instructions they will need. Your broker will also need to contact Orchard Alliance for the most current account number.

### STEP 3

Your broker will transfer the shares to Orchard Alliance's gift account at Graystone Consulting.

### STEP 4

Once Orchard Alliance receives the transfer, we will process the gift.

### STEP 5

The gift, along with a letter, is then sent to the designated ministry(s) OR the gift will fund your specified account at Orchard Alliance.

### STEP 6

The following month, you will receive a receipt in the mail for your gift.

### ADDITIONAL INFORMATION

For more information about Gifts of Securities or other giving questions, please contact Orchard Alliance.

833.672.4255

[service@orchardalliance.org](mailto:service@orchardalliance.org)

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# Security Gift Form



## INSTRUCTIONS

Please complete the form below and return it to Orchard Alliance.  
The bottom portion of the form contains transfer instructions to be given to your broker.  
Please call 833.672.4255 or email [service@orchardalliance.org](mailto:service@orchardalliance.org) if you have any questions.  
*We highly recommend that you consult with your tax advisor to consider tax implications of this gift.*

Named owner of the security \_\_\_\_\_

Address of owner \_\_\_\_\_

Phone number \_\_\_\_\_ Email address \_\_\_\_\_

Name of the security \_\_\_\_\_ Number of shares \_\_\_\_\_  
(Attach a separate sheet if necessary)

This gift will fund a charitable account at Orchard Alliance.

Account type:  Donor Advised Fund  Charitable Gift Annuity  Charitable Trust  Endowment

This is a direct gift to a charity. (\$125 processing fee per gift applies. Recommended minimum gift value is \$2500 or greater.)  
Provide the name and address of charity

\_\_\_\_\_

Designation (if any) \_\_\_\_\_

Please process this gift as anonymous to the charity.

Signature \_\_\_\_\_



*Please provide the following information to your broker for electronic transfer of securities:*

Graystone Consulting,  
a business of Morgan Stanley  
760 W. Main Street  
Suite 200  
Barrington, IL 60010  
847.382.3802 Attn: Diane Wasilk

Account # = Phone 888-689-6300, ask for Gift Processor  
Account name = Orchard Alliance Gift Account  
DTC # = 0015  
EIN for Orchard Alliance = 84-1466105

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