

Old Presbyterian Meeting House Securities Donation Guidance

The purpose of this document is to provide members of the Old Presbyterian Meeting House (OPMH) with guidance on how to donate securities to Old Presbyterian Meeting House. Contact asiirila@opmh.org for an electronic copy of this form.

You should send a letter of instructions to your broker that provides the following information:

Dear Broker:

I/We wish to make an irrevocable gift to my/our church, the Old Presbyterian Meeting House, of the following securities:

100 Shares of Acme Corporation Stock.

These securities are to be transferred from my/our account to the account of:

Old Presbyterian Meeting House - Brokerage Account
Account No. 59847668

The Vanguard Group, Inc. (DTC and OCC Clearing # 0062)
PO Box 2600
Valley Forge, PA 19482

IRS Regulations state that the gift date for valuation purposes is the date of transfer to the church; please act quickly.

Sincerely,

Your Name

Cc: Aaron Siirila, Old Presbyterian Meeting House

It is helpful if you call the Church Administrator at 703.549.6670 to alert the office about the donation and how you want the donation applied, e.g., Operating Fund.

Once the securities are received, the Church Administrator will prepare and send a letter of acknowledgment to you for your tax purposes. This letter should also become part of your records for tax reporting purposes. If the gift is being used toward a pledge, the church will compute a value for the donation for pledge purposes. The church cannot offer tax advice and the value of the donation for tax purposes may be different than the pledge value.