

**STOCK TRANSFER Instructions/Notification Form** - Revised: 2022

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Parishioner Name

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Name of Stock

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# of shares

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Purpose of Donation

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Approx. Date of Transaction

When donating stock the information below may be needed.

**For electronic delivery (via DTC)**

Receiving broker name:

Charles Schwab & Co., Inc., DTC # 0164 and Code# 40

Receiving broker account:

Credit to account: The First Congregational Church in Wellesley Hills

(If you need the account #, please contact the office or email [dooley@hillschurch.org](mailto:dooley@hillschurch.org))

Tax ID of church: 04-2103774

Investment Agent: Jessica T Truong

Investment Agent address and phone:

Birch Hill Investment Advisors LLC, One International Place Suite 770, Boston, MA  
02110, Phone: 617-502-8307

***Please also e-mail a copy of this completed form or the stock name, # of shares and purpose of donation to: [dooley@hillschurch.org](mailto:dooley@hillschurch.org) so that the church is able to post the donation to the proper account.***