

St. John's of Lattingtown Church

325 Lattingtown Road
Locust Valley, NY 11560
516-671-3226

A gift of appreciated securities that you have owned for more than a year can be an advantageous way of fulfilling your pledge to St. John's. Capital gains taxes are completely avoided and a tax deduction can be taken for the full market value rather than just your original cost. Appreciated property is deductible up to a limit of 30% of you adjusted gross income, with a five-year carry-over period.

How to Gift Securities to St. John's of Lattingtown

Should you decide to gift Securities to St. John's the process is quite simple:

1. *If your securities are being held by a bank or brokerage firm:* Write a letter to that entity instructing them to deliver the shares in the name of St. John's of Lattingtown via **DTC 0141** to account number **67257412**. Please also instruct them to give telephone advice to **Joanne Campbell Schiefer** at **Wells Fargo Advisors, LLC** that the securities are coming over. **Joanne Campbell Schiefer's telephone number is (516) 663-4137** She will advise the Church of the gift.
2. *If your securities are held by you in certificate form:* please contact Joanne Campbell Schiefer at (516)663-4137 . She will mail a kit to you facilitating the securities transfer to St. John's of Lattingtown.