

# Countryside Church

Unitarian Universalist

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## Stock Donation Transfer Information

Instruct your broker to transfer the stock to:

Broker Number (DTC): 0226

Broker Name: National Financial Services, LLC

Account number NET009016

Account name: Countryside Church Unitarian Universalist

Please reference the donor's name or donee organization for tax recognition purposes.

Phone: Oberweis Securities Broker Services, 800-323-6166

In addition, please let the Congregational Administrator or the Board Treasurer know when the transfer has taken place, so they can be expecting the transaction and know who has made the donation. In case of questions or problems, feel free to contact the Church Office by phone, 847-359-8440 ext 1, or by email, [office@ccuu.org](mailto:office@ccuu.org).

Countryside Church UU (CCUU) will credit your annual pledge with the value of the stock on the date of transfer (average of the high and low prices of that day, per IRS publication 561), and will issue you a receipt for your tax records. It is the standard practice of CCUU to sell the stock as soon as possible after the transfer is complete -- the net proceeds to CCUU after selling the stock may be more or less than the amount credited to you.