



STRATEGIC RENEWAL

Gifting Via Direct Electronic Transfer of Securities

Gifting stocks and other marketable securities can be an excellent way to support the ongoing ministry of Strategic Renewal while minimizing your tax consequences on appreciated investments.

One of the considerations you should be aware of is that your securities need to be transferred directly to Strategic Renewal's brokerage account in order for you to take full advantage of the tax benefits available. If your investment has not appreciated in value it may be more advantageous for you to sell it directly and donate the proceeds to Strategic Renewal. Please contact your broker or tax advisor concerning which option is best for you.

To help you in the transfer of stock to Strategic Renewal, please follow these steps:

1. Please instruct your broker or institution to do a DTC transfer, sending the shares to:

**Pershing LLC
One Pershing Plaza
Jersey City, NJ 07399
888-367-2563**

**DTC # 0443
Account # 5HQ217802
Account name: Strategic Renewal International**

2. Please call us 720-627-5932 or e-mail office@strategicrenewal.com with the details of your stock transfer. **It is imperative that you contact us with the following information:**

- Name of Stock or Security (e.g. – ticker symbol);
- Number of shares

If you or your broker should have any questions, please contact us at 720-627-5932. Our policy regarding receipt of investments is to sell those securities upon receipt. Once we receive notification that the stock has been received by our broker, we will send you a notification letter for your tax purposes outlining the number of shares received and the market value of the securities generously gifted on the date of receipt from Strategic Renewal.

Thank you for your faithfulness and generosity!