

First Unitarian Universalist Society Stewardship Campaign

Instructions for Gifts of Securities

The First UU is very happy to accept gifts of stock for the annual stewardship campaign. The way you give gifts of stock depends on how the stocks are held.

1. Please let Christina Fulton know the name of the security you will be gifting and the number of shares so that we know who the canvass gift is from. Wire transfers do not include the name of the donor, so if you do not notify us, we may not know who made the gift.
2. If the stock is held in “street name” at a brokerage firm, send written authorization to your broker or trust officer to wire the shares to:
Charles Schwab and Co.
101 Montgomery Street
San Francisco, CA 94104
DTC #0164
for credit to the First Unitarian Universalist Society Trust, Account # 6233 0547.
3. If you hold the stock certificate(s): Please contact Christina Fulton at 802-862-5630 ext. 22 for exact instructions.