

Procedure for making a Gift of Stock to Holy Trinity Greek Orthodox Church

Gifts of securities are simple to donate and may provide favorable tax benefits.

Gifts of securities are credited on the date of transfer to Holy Trinity and are valued at the mean of the high and low quoted sales price on that day in accordance with the parish's Gift Acceptance Policy.

Stock may be donated as follows:

By electronic transfer Depository Trust Company (DTC) of the shares between your broker and Church's representative at Schwab. Please call the Cathedral office at 317.733.3033 to notify the parish of your plans to make a gift of stock. Stock transferred in this fashion is valued on the date of the transfer according to the parish's gift acceptance policies.

It is important for the parish office to know the identity of the donors of all securities gifts in order to give prompt and accurate credit for all gifts received. Particularly in the case of an electronic transfer, it is often very difficult to obtain this information after the transaction is processed. Therefore, in addition to instructing your broker to include your name and address in the DTC transfer instructions, please share your plans by contacting the parish office at 317.733.3033 or sending an email to Staff@HolyTrinityIndy.org informing them of the transaction.