Need assistance with gifting Appreciated Assets (stock, etc.) to Grace Lutheran Church?

Kerry Knipp-Hollon can assist you with this process.

From: **Kerry Knipp-Hollon** <kerry.knipp@lfnd.org>
Date: Thu, Feb 12, 2026 at 10:28 AM
Subject: Gifted Securities
To: Warren Reneau

Thank you for our conversation this morning. It was a pleasure talking with you. The form we discussed is attached. Please share this with any donor who may gift securities to your campaign.

If anyone has any questions, my phone number is 800-325-7912 extension 1678. I'll be happy to help however I can.

Blessings to Grace, and your growth plans!

In His Service,

Kerry Knipp-Hollon
Vice President Client Services
Office: 314-996-1678
Address: 1333. S. Kirkwood Road,
St. Louis, MO 63122-7295

LCMS Foundation

TODAY | TOMORROW | FOREVER

SECURITY TRANSFER NOTIFICATION

Be advised that advance notice is essential to ensure the prompt and accurate processing of gifted securities. Complete the information below and email or fax it to the LCMS Foundation prior to initiating the transfer. Failure to do so could result in significant processing delays and loss in value.

LCMS Foundation Contact Information

Phone number: (800) 325-7912
Email: GiftedSecurities@lfnd.org
Fax: (314) 996-1132

Name of security and ticker:

Sending broker or transfer agent:

Number of shares:

Approximate value:

Date Transfer Requested:_____

How the securities are currently held (check one). See reverse side for transfer instructions. ☐

Electronically with an investment broker (transfer via DTC)

- ☐ Account – Mutual Funds/DRS/DRIP/etc. (transfer using transfer agent)
- ☐ Physical stock certificate

How the proceeds are to be distributed:

- ☐ Distribute to*:

  ~~Ministry Name~~

  Ministry Address (City and State Required)

  Designated for, purpose, or LCMS Foundation account number of ministry named

- ☐ Deposit to my LCMS Foundation account: ~~LCMS~~ Foundation ~~account number~~

*If distributing to more than one ministry, see reverse side.

Fees will be assessed by the Foundation in accordance with the Fee Schedule applicable to the type of gift made. Contact the LCMS Foundation if you would like to receive a copy of the fee schedule.

Name Phone Number

Address Email Address

City, State, Zip Code Signature(s)

SECURITY TRANSFER INSTRUCTIONS

DTC Transfer Instructions
Charles Schwab
DTC Participant #0164
Account Name: LCMS Foundation Account #: 61780941
Comments/FFC/FBO: (Insert donor last name - LCMS entity name)

Account to Account Transfers
Contact Brad Conrad at the LCMS Foundation to determine if an account exists with the mutual fund company before initiating any transfer.

Physical Security Instructions
LCMS Foundation
Attn: Brad Conrad
1333 S. Kirkwood Road
Saint Louis, MO 63122-7295

If a physical stock certificate is being gifted, a stock power must be completed and mailed separate from the stock certificate. It is strongly advised that the stock certificate be mailed via Registered & Insured Mail and be insured for the current market value of the stock. The stock power may be sent by regular mail.

GIFT DISTRIBUTION FOR MULTIPLE MINISTRIES

Ministry Name and Address (City and State Required)	Tax ID #	Purpose	% of Proceeds
			%
			%
			%
			%
			%
TOTAL			**%**