EDSD
COURAGEOUS LOVE

Stock Transfer Instructions

You may receive tax benefits by making a gift of appreciated stock. To do so, instruct your broker to transfer shares directly from your account to the Episcopal Diocese of San Diego with the following information:

Brokerage Firm: Charles Schwab

Account Number: 2060-5396

DTC Number: 0164, Code 40

Name on Account: The Episcopal Diocese of San Diego

Tax ID: 95-2861286

Contact: David Jay, Director of Development djay@edsd.org or 619-481-5450

NOTE: Once you have initiated the transfer of shares, please email David Jay at djay@edsd.org to notify us. *Electronic transfers of stock may not include your information, so we may be unable to properly receipt and acknowledge your gift if you do not let us know.*

If you have any questions or want to know about other tax-advantaged ways to financially support the diocese, contact David Jay at 619-481-5450.