

### **Instructions for Stock Gifts to Trinity**

October 2021

The following are instructions for making gifts of stock to Trinity Episcopal Church, Shelburne, VT:

- 1) Work with your broker to complete instructions for them to Partially Delivery Shares to Fidelity Investments DTC: 0226 For Further Credit: 679-880442 Trinity Episcopal Church
  - 2) E-mail Matthew Johnson ([mjohnson@intrackinvest.com](mailto:mjohnson@intrackinvest.com)) and Myron Sopher at ([msopher@intrackinvest.com](mailto:msopher@intrackinvest.com)) to let them know which stock will be donated, how many shares and the name of the person donating. If we do not confirm receipt of the e-mail within 24 hours please follow up with a phone call to (802) 658-0625.
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- A) Unless otherwise instructed by Trinity Episcopal Church InTrack Investment Management will sell the stock and forward the proceeds to the church.
  - B) InTrack will e-mail the name of the stock, how many shares, the price it was sold at and the proceeds and the person who donated to a representative of the Trinity Episcopal Church.
  - C) Stock transfer processing time varies and sometimes the stock arrives after normal trading hours. Once notified of an incoming transfer InTrack Investment Management will work on a best efforts basis to sell the stock.