



GIFTS OF STOCK OR SECURITIES INSTRUCTIONS

Gifts of appreciated securities are tax-exempt to the extent allowed by law. Consult your tax advisor for more information. All stock gifts to Montreat Conference Center are sold on the date they are received and are not held.

Transfer securities in two ways:

1. Your broker may electronically transfer ownership of the stock to Montreat Conference Center's account at First Citizens (see account information below).

Please notify or have your broker notify Susan Akduman, Donor Records Coordinator, at (828) 419-9805, when you have initiated an electronic transfer for donations of stock.

Stock transfers must be initiated by April 15 in order to allow time for processing by Montreat's April 30 fiscal year end.

Give your broker the following information:

Account name: Mountain Retreat Association (DBA Montreat Conference Center)

Brokerage firm: First Citizens Investor Services

DTC Number: 0443

FAO Mountain Retreat Association

Account #TNQ-067455

2. Another option is to mail stock certificates, unendorsed, with a signed stock power (available from your financial services provider), in separate envelopes to:

Montreat Conference Center

Office of Development

PO Box 969

Montreat, NC 28757

If you have any questions, please contact Susan Akduman, Donor Records Coordinator, at (828) 419-9805 or susana@montreat.org

We gather people to experience God's transforming power and inspire love for the world.