

Trinitarian Congregational Church
53 Cochituate Road
Wayland, MA 01778
508-358-7717



Transfer Instructions for Stock Gifts

Updated 6/20/2019

If you would like to make a stock gift to the church,
please see the instructions below

1. Stock Transfer from different Brokerage other than Fidelity:

- Log on to Fidelity.com
 - Download and complete Fidelity's form "Transfer of Assets from Another Institution" found under the Customer Service tab – Find a Form.
 - Mail or deliver completed form to a Fidelity office.
- Or you can go to the Fidelity office in Framingham and have an advisor help you

Transfer stock to: Fidelity Investments

DTC #: 0226

For Credit To: Trinitarian Congregational Church

TCC Account #: Z67-206997 - for ANNUAL GIVING (Church & Missions)

<https://www.fidelity.com/bin-public/060> www.fidelity.com/documents/customer-service/transfer-assets-to-fidelity.pdf

2. Stock Transfer Within Fidelity:

- Log into **YOUR** account at Fidelity.com
- Look for tab "Find a Form" and find the form "**Transfer of stock from Fidelity Account**".
- Fill it out online or go to the Fidelity Office and have an advisor help you with the form.
- The TCC account information is the same as above.

3. Transfer Instructions for Cash Gifts - If you would like to make a cash gift to the church please see the instructions below.

- Cash Transfer - Please instruct your bank to:
 - Wire to: J.P. Morgan Chase, NY
 - ABA number: 021000021
 - For credit to: National Financial Services LLC
 - Account #: 066196-221
 - For benefit of: Trinitarian Congregational Church
 - TCC Account #: Z67-206997 – for ANNUAL GIVING
 - Address: One Chase Manhattan Plaza, New York, NY 10005

Please notify Mary Ayotte and Aimee Mury in the church office at (508) 358-7717 ext. 303 or 304, or preferably by e-mail bookkeeping@tccwayland.org & contributions@tccwayland.org when a gift transfer has been initiated. Also indicate name(s) of stock and quantity. Thank you.