



Lutheran School of Theology at Chicago

Instructions for Giving Stock or Securities to LSTC

Donating stock or other securities to the seminary offers you an opportunity to invest in theological education while potentially realizing significant capital gains tax savings. LSTC will assign the value of your gift, for counting purposes, based on the average of the high and low market values on the date of transfer. Be sure to consult a tax advisor for guidance on how to value gifts of securities for tax purposes.

Electronic Transfer: DTC-eligible stocks and securities can be transferred electronically to the seminary's account by your financial institution. Your broker will need the following information to make the transfer:

UBS Financial Services, Inc. DTC
Clearing 0221
A/C Number CP 39276 E7
Lutheran School of Theology Donation A/C
Attention: Rick Held, UBS Financial Services, (312) 525-4589

LSTC's federal tax ID is 36-2246704

Mutual Funds: Some mutual funds and other investments may not be eligible for transfer via the DTC platform. Ask your financial representative and contact LSTC to determine how best to affect the transfer.

To ensure proper delivery and recording of your gift, please be sure you or your financial services firm inform the Advancement Office (advancement@lstc.edu) of the transfer details and your gift intentions before the transfer is processed.

For questions and assistance with donating securities, contact:

Jennifer Stone
Director, Advancement Operations
Phone: (773) 256-0712
Email: jennifer.stone@lstc.edu

Mailing Address:
Advancement Office
Lutheran School of Theology at Chicago
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