

Giving Stock to BCEC

BCEC maintains its brokerage account at Fidelity Investments. Therefore, there are different instructions depending on whether you are transferring shares from a Fidelity account or a non-Fidelity account.

*A. Transferring From a **Non-Fidelity** Account:*

1. You must contact your brokerage firm and inform them that you would like to gift shares to BCEC. They will each have their specific form and or online process.
2. You will be asked to provide the account name, account # and DTC # for BCEC.
 - a. Our account name is: "Boston Chinese Evangelical Church"
 - b. Our General/Charity/Missions Fund account # is: X01374490
 - c. Our Expansion Fund account # is: X01375250
 - d. Our DTC # (Depository Trust Company) is: 0226
3. You **must** email BCEC's treasurers at: bod.treasurer@bcec.net and inform them of your name, what fund you are specifying the gift for, the # of shares, name of security, when you expect the shares to be transferred, and your BCEC giver ID.

*B. Transferring From a **Fidelity** Account:*

1. All requests to transfer shares as a gift between Fidelity accounts must be done in writing. The following information must be in the **signed** letter of instruction.
 - a. Your Account information:
 - i. Name of all registered owners
 - ii. Your brokerage account number
 - iii. Current recorded address of the account
 - iv. Your daytime telephone number
 - b. BCEC account information
 - i. Name and address of recipient
 - ii. Tax ID number
 - iii. Fidelity Account Number
 1. Our General/Charity/Missions Fund account # is: X01374490
 2. Our Expansion Fund account # is: X01375250
 - c. Gift Allocation
 - i. Complete Name of Security (e.g. "Google")
 - ii. Number of Shares (e.g. "100")
 - iii. CUSIP (e.g. 38259P508)
 1. To find the CUSIP #, go to Fidelity.com, click on "Research", click on "Quotes" in the menu underneath Research, and then click on the "Symbol Lookup" link to the right of the "Quote" button. Enter the name of the security and the CUSIP # will appear.
2. Signature guarantee on the letter
 - a. If the gift is less than \$10,000, no signature guarantee is needed.
 - b. If the gift is over \$10,000, you are required to get a signature guarantee on the letter.
 - c. A signature guarantee is a certification given by certain organizations that a signature is genuine, the signer is the appropriate person to endorse, and the signer has the legal capacity to sign.
 - d. A notary public cannot provide a signature guarantee and we are unable to accept a notarization instead of a signature guarantee.
 - e. Where to get a signature guarantee? You should be able to obtain a signature guarantee from a bank, a broker (including Fidelity Investor Centers), a dealer, a credit union (if authorized under state law), a securities exchange or association, a clearing agency or a savings association.

3. Send the letter to Fidelity Investments

Regular mail:

Fidelity Investments
Attn: Account Reregistration Services
P.O. Box 770001
Cincinnati, OH 45277-0039

Overnight or certified mail:

Fidelity Investments
Attn: Account Reregistration Services
100 Crosby Parkway
Mailzone KC1C
Covington, KY 41015-4325

4. You **must** email BCEC's treasurers at: bod.treasurer@bcec.net and inform them of your name, what fund you are specifying the gift for, the # of shares, name of security, when you expect the shares to be transferred, and your BCEC giver ID.