



CONNECT. GROW. SERVE.

Donating Stock to Bethel Lutheran Church

Dear Members and Friends of Bethel,

Thank you for your interest in donating stock to Bethel. For many people, donating stock is a tax effective way to give. If you have any questions about the process, please contact the church office and we will be glad to assist you!

Important: As you begin the transfer process, please contact Ilene Firth in the Bethel Downtown office (715-386-8821 x105 or ba@bethelhudson.org) she will need the following information to ensure your gift it is credited to your Bethel member number:

1. Your name: _____

2. Stock name or symbol: _____

3. Number of shares: _____

4. How should this donation be used?

☐ Regular church operations (pays for youth and adult ministries, monthly expenses, etc.)

☐ Capital fund (pays off debt and used to make major capital repairs)

☐ Or Other Intention

Please provide the following information to your brokerage firm.

Stock Transfer Information

LPL Financial is the brokerage or clearing house.

The LPL Financial dealer transfer number: DTC #0075

Funds are then transferred from LPL Financial to CPR Wealth Advisors in Hudson.

***Bethel's account number at CPR Wealth Advisors: 34746080
715-386-1335***

If needed, Bethel's tax ID number is: 39-0963084