



How to Make a Gift of Securities to Camp Allen

The Diocese, through the auspices of the Protestant Episcopal Church Council of the Diocese of Texas (The Church Corporation), is a tax-exempt 501(c) (3) corporation incorporated in the State of Texas. Gifts are, therefore, tax deductible.

The Diocese will be happy to assist with these gifts. You may contact Mr. David N. Fisher, Director of Foundations for the Episcopal Diocese of Texas to arrange for donations of securities to be designated to Camp Allen.

The easiest way to transfer stocks or bonds is by having your broker electronically deliver the securities to: Episcopal Diocese of Texas account (U7716754) at Interactive Brokers, LLC. (DTC# 0534). Stock must be sent by F.O.P (free of payment) or free through DTC – this way the account title mis-match of donor & Non-Profit Org. is not an issue.

Gift of securities in the form of certificates should be sent via registered mail to Mr. Fisher in care of the Diocese at 1225 Texas Ave., Houston, Texas 77002-3504. (If the securities are in your name, please forward a signed stock power under separate cover.)

Notification of securities transfers should be sent to David Fisher at either the physical address above, by e-mail to dfisher@epicenter.org, or by fax to 713-521-2218. To ensure a smooth transfer please provide the following information in advance of the transfer being made.

Name of the security or securities to be donated
Ticker symbol
Number of shares
Name of the donor
Name of the delivering brokerage firm and their DTC#
Account number at delivering broker

Please contact Mr. Fisher at 713-520-6444 or 800-318-4452 if you need assistance.