



How to Make a Gift of Securities to Camp Allen

Tax Exemption: The Diocese, operated by the Protestant Episcopal Church Council of the Diocese of Texas (The Church Corporation), is a tax-exempt organization under section 501(c)(3) of the IRS code. Therefore, any gifts made to the Diocese are eligible for tax deductions.

Contact for Donations: If you wish to donate securities to Camp Allen through the Diocese, please get in touch with Mr. David N. Fisher, Director of Foundations for the Episcopal Diocese of Texas. He will assist you with the process.

Transfer Process:

- The preferred method for transferring stocks or bonds is through your broker. They can electronically deliver the securities to the Episcopal Diocese of Texas account (U7716754) at Interactive Brokers, LLC (DTC# 0534).
- Ensure the transfer is "F.O.P" (free of payment) or free through DTC to avoid any issues with account title mismatch.
- If you hold physical certificates of the securities, send them via registered mail to Mr. Fisher at the Diocese's address (1225 Texas Ave, Houston, TX 77002). If the securities are in your name, include a signed stock power under separate cover.

Notification: After initiating the transfer, notify David Fisher of the details either by mail or email. Include:

- Name of the security/securities being donated
- Ticker symbol
- Number of shares
- Your name as the donor
- Name and DTC# of the delivering brokerage firm
- Account number at the delivering broker

Contact Information: If you require assistance or have any questions, contact Mr. Fisher at 713-520-6444, 800-318-4452, or dfisher@epicenter.org.

By following these steps and providing the necessary information, you can smoothly donate securities to support Camp Allen through the Diocese.