

GIFTS OF STOCK TO CTS

Security Transfer Instructions:

Chicago Theological (CTS) accepts gifts of stock through our partnership with United Church Funds, Inc. (UCF).

Securities held at a bank or in a broker account are generally accepted for transfer to CTS through UCF. Such a transfer is made via UCF's custodian/broker, The Bank of New York Mellon/Pershing, LLC.

United Church Funds staff, working with their brokerage team, will assist you to complete this transfer and may suggest additional procedures required for transfer to Chicago Theological Seminary.

First Step:

- Please notify United Church Funds of your gift to CTS. Please note the date and amount of your transfer, including security name and CUSIP, via phone 877.806.4989 or email info@ucfunds.org

Transfer Options:

DTC Eligible Securities

DTC# 0443 Pershing, LLC Account Number 890-051238-5

Account: UNITED CHURCH FUNDS FFC #N7M001442

Note the following on transfer instructions:

Account name: United Church Funds, Inc.

Customer Account Credit: Chicago Theological Seminary

Fed Eligible Securities

ABA# 021000018 BNY

BNYM/Pershing, LLC Account Number 890-051238-5

Account: UNITED CHURCH FUNDS FFC #N7M001442

Note the following on transfer instructions:

Account name: United Church Funds, Inc.

Customer Account Credit: Chicago Theological Seminary

Securities in Certificate Form

Securities held in Certificate Form and required paperwork will be processed by BNYM's clearing broker, Pershing, LLC.

Mutual Funds

UCF does not hold accounts with retail mutual funds; therefore, all such accounts must be liquidated by your local broker and the resulting cash balance be remitted to Chicago Theological Seminary.

More Information:

Please contact the Office for Advancement at CTS via phone 773.986.2430 or email advancement@ctschicago.edu
You may also contact United Church Funds via phone 877.806.4989 or email info@ucfunds.org

ctschicago.edu

