

# 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](mailto:info@ucfunds.org)

## Transfer Options:

### DTC Eligible Securities

DTC# 0443 Pershing, LLC

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: 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](mailto:advancement@ctschicago.edu)  
You may also contact United Church Funds via phone 877.806.4989 or email [info@ucfunds.org](mailto:info@ucfunds.org)

[ctschicago.edu](http://ctschicago.edu)

