

St. Aidan's Episcopal Church *Capital Campaign*

Statement of Intent

Donor Information

Name *(Please print)*

Mailing address

City

State

Zip code

Tel (H)

Tel (W)

Email

Gift Information

It is my/our intention to contribute to St. Aidan's Episcopal Church—in cash, securities and/or marketable real or personal property—a total of \$_____ payable over the next _____ years.

Payment Schedule

My/our intent is to divide this gift into annual semi-annual quarterly monthly payments as follows.

Payments will be made by

Amount to be paid

Date

\$

Date

\$

Date

\$

Date

\$

Date

\$

My gift may be matched by my company.

Payment Information

Please send me/us a statement 30 days in advance of each due date

My/Our initial payment of \$_____ is enclosed, payable to St. Aidan's Episcopal Church

Please contact me about setting up an Electronic Funds Transfer (EFT).

Please charge my first payment of \$_____ all payments of \$_____ through my
 Visa MasterCard Amex

Card number

exp. date

Name as it appears on card

Billing address if different from above

Recognition

The following is the manner in which my/our name is authorized to appear on any official/public recognition.

Name(s)

List my/our gift

In Honor of

In Memory of

Please do not list my/our name as I/we wish to remain anonymous.

I /we wish to make a gift in honor or memory of:

I /we wish to make a gift in thanksgiving:

This gift is restricted to this project and will not be used for any other purpose unless specified by the donor(s). The donor(s) will make every effort to honor the scope and timing of this commitment, but reserves the right to modify it in the event of unforeseen circumstances.

Authorizing Signature

Date

For questions, please contact Joe A Lopez (818) 707-6911

28211 Pacific Coast Highway, Malibu, CA 90265 ▲ staidanschurch.org

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Gifts of Securities

Method of Transfer

- Electronic Transfer** from brokerage firm account to St. Aidan's Episcopal Church account.
 - Your broker will require a letter of authorization to make the transfer.
 - Please notify Joe A Lopez (818) 707-6911 once you have authorized the transfer and to review what stocks you are transferring so that he may follow up to ensure its arrival into the St. Aidan's account.
 - The date the stock is actually received into the Church's account will be the date used for contribution credit.
 - Give your broker the following instructions:

Please transfer the indicated shares from my/our:

Account # _____

Brokerage Firm _____

Stockbroker Name _____

Telephone Number _____

To the account of:

Account #554-12570

Morgan Stanley Smith Barney

Brokerage: Morgan Stanley Smith Barney

Broker/Financial Advisor: Michael Page

Stock certificates

If you have the actual stock certificates, these can also be assigned to Saint Aidan's Episcopal Church. Each certificate needs to be signed by each person listed on the front of the certificate(s). A letter of contribution gifting the stock to the church must accompany the gift. Each person listed on the stock certificate(s) must also sign the letter

Deliver the certificates to Michael Page, Morgan Stanley Smith Barney, 9665 Wilshire Blvd, Suite 600, Beverly Hills, 90212 for assignment to St. Aidan's Episcopal Church.

Stock certificate will be deposited into the St. Aidan's account as of the next business day, which will be the date used for contribution credit.

Acknowledgment of receipt of above named certificates

Signature of St. Aidan's Episcopal Church Representative

Date

For Office Use Only

Stock	Date of Transfer	Day High	Day Low	Average	Value
Stock	Date of Transfer	Day High	Day Low	Average	Value
Stock	Date of Transfer	Day High	Day Low	Average	Value

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Total Value
