



Shoreline Unitarian Universalist Society

ASSET TRANSFER INSTRUCTIONS

To transfer securities from your IRA or other holdings, please contact your financial advisor or custodian (ie Merrill Lynch, Vanguard). You will be asked to fill out a form and designate Shoreline Unitarian Universalist Society as the recipient. The following information will be needed.

Shoreline Unitarian Universalist Society
297 Boston Post Road,
Madison CT 06443

BROKERAGE ACCOUNT:

SagePoint Financial, Inc.
DTC #0443
A/C #7J5-035250
fbo Shoreline Unitarian Universalist Society

Please let the SUUS treasurer or president know when you transfer funds so we can alert our account manager.

Thanks you so much for your generosity and support of our congregation.

Mary Strieff
Stewardship Chair
September 11, 2019