

## Transfer of Investments form Beacon Unitarian Church

1. Contact your broker/advisor and tell them that you wish to transfer "In Kind" a certain number of shares (if stocks), bonds or units (if mutual funds) to Beacon Unitarian Church's account at the Edward Jones office in New Westminster.

Attention: Nick Cheng, Financial Advisor [nick.cheng@edwardjones.com](mailto:nick.cheng@edwardjones.com)  
Edward Jones (Branch #01065)  
Unit #159 – 555 Sixth Street  
New Westminster, BC V3L 5H1  
Phone: 604-517-1023  
Fax: 877-629-5658  
Beacon's account # is 202-83427-11

2. Complete the bottom section of this page and return it to Beacon's Treasurer Carol Woodworth to notify her that the transfer is coming. That will ensure you receive the appropriate tax receipt. Transfers will be credited to the fiscal year in which they are received unless you tell us otherwise.

Thank you for your support.  
Beacon Board of Trustees

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**To Beacon Unitarian Church:**

I am in the process of transferring some of my investments "in kind" to Beacon. General information, such as the approximate amount or number of shares, etc. follows:

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( ) I understand that the Board will determine how best to use these funds for the ongoing work of the Church:

Other instructions or comments:

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\_\_\_\_\_  
Your address

\_\_\_\_\_  
City/Province/Postal Code

\_\_\_\_\_  
Your phone number

\_\_\_\_\_  
Your email address

\_\_\_\_\_  
Your name (please print)

\_\_\_\_\_  
Your signature

\_\_\_\_\_  
Today's date