



# Lake Wapogasset Lutheran Bible Camp, Inc.

Wapo • Ox Lake • Luther Dell • Wilderness Canoe Base  
738 Hickory Point Lane Amery WI 54001

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## SECURITIES INSTRUCTIONS SHEET

### For electronically transferred stock

- Please use the attached sample authorization letter for gifts of publicly traded stock. It is intended for you to send to your broker.
- Gifts of stock should be owned more than twelve months. (Contributed securities owned for twelve months or fewer are considered a short-term asset, and in such cases the IRS requires that the donor's charitable deduction be based on the asset's cost basis rather than on its fair market value.)
- Stock that is not publicly traded must receive prior approval from Lake Wapogasset Lutheran Bible Camp, Inc.
- For electronically transferred stock, the gift date is the date your stock arrives in the Lake Wapogasset Lutheran Bible Camp, Inc brokerage account.
- For a gift comprised of multiple assets, the gift date is the date on which the last of the intended assets is received by Lake Wapogasset Lutheran Bible Camp.

### Securities with *Increased Value*

- Transfer the securities directly to the Lake Wapogasset Lutheran Bible Camp account with UBS Financial Services. The attached authorization letter provides the Lake Wapogasset Lutheran Bible Camp information for you to give to your broker.
- UBS Financial Services will sell the securities on Lake Wapogasset Lutheran Bible Camp's behalf, therefore bypassing or avoiding tax on capital gain, depending on the type of gift.

### Securities with *Decreased Value*

- It is highly recommended that you sell the securities first.
- Recognize a capital loss for the difference between the purchase and sale prices.
- Donate the cash proceeds by writing a check payable to Lake Wapogasset Lutheran Bible Camp, Inc.

**To give other types of securities, including stock certificates, mutual funds, bonds, etc, please email Dee Dee Gould, director of finance, at [deedeeg@campwapo.org](mailto:deedeeg@campwapo.org) or call directly at 715-268-8434, ext 104.**

# SAMPLE SECURITIES TRANSFER AUTHORIZATION LETTER

Please revise the *italicized* portions of this letter and send it to your broker.

*Donor's Street Address*  
*Donor's City, State Zip*  
*Date*

*Agent or Broker Name*  
*Agent or Broker Street Address*  
*Agent or Broker's City, State, Zip*

Dear *Agent or Broker Name*:

Please accept this letter as authorization to DTC transfer *description of securities to be gifted* from my account #*account number* to the Lake Wapogasset Lutheran Bible Camp, Inc account as follows:

UBS Financial Services, Inc  
8500 Normandale Lake Blvd, #210  
Bloomington, MN 55437  
Tom Vaudreuil, account representative  
Account Name: Lake Wapogasset Lutheran Bible Camp  
DTC Number: 0221  
Account Number: 7N07273VH

Please contact Dee Dee Gould, director of finance, at [deedeeg@campwapo.org](mailto:deedeeg@campwapo.org) or 715-268-8434, ext 104 with the exact date the shares are transferred out of my account.

Sincerely,

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Second Donor Signature (if held jointly)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Medallion Guarantee Stamp (if applicable)