

Transferring Stock or Mutual Funds to the Church

Participant Information

South Lyon First United Methodist Church maintains an account at Raymond James for the purpose of accepting stocks or mutual funds from donors for contributions to the Operating Fund, Memorial Fund or any other special fund. (Please note that this does not include the Endowment Fund.)

Please be aware of the following policies adopted by the Finance Team.

1. It is the responsibility of the donor to transfer his/her stocks or mutual fund into the church's Raymond James account from his personal financial institution.
2. Any donor wishing to make a transfer during a particular calendar year should initiate the process before Oct. 31st. Neither the church nor Raymond James can guarantee that transfers initiated after that date will be completed in the same calendar year.
3. Stocks and/or mutual funds transferred to Raymond James will be sold as soon as possible by directive of the designated church personnel.
4. The donor must notify the Financial Secretary that a donation is on its way. The Financial Secretary will need information as to which fund it will be deposited to, etc. Contact the Financial Secretary, Lindy Juergens at 248-437-0760.

The church account for this purpose is administered at Raymond James by Andrea Kotch Duda. She can be reached at 248-932-5450 or 800-548-8008.

The Raymond James account that will receive the transfer is the First United Methodist Church Business Account, #32344400. (This information will be needed by your financial institution.)

IRA Contributions

Participant Information

Donors may want to make contributions to the church directly from an IRA. Each donor should consult with his/her financial advisor to determine if there is a tax advantage in doing so. Most financial institutions prefer to send a check made out to the church, **First United Methodist Church of South Lyon**. The check can be sent to either the address of the donor or to the church at 640 South Lafayette, South Lyon, MI 48178.

The donor will need to fill out the **Special Donation Form** and submit it (either in paper form or by email) to the Financial Secretary, Lindy Juergens. The **Special Donation Form** is on the website in the section called **Calendar & Forms**.

For further information call the Financial Secretary, Lindy Juergens, at 248-437-0760.