

Giving Stock to Ocean City Church FAQ

Ocean City Church receives stock and ETF donations through Charityvest, a secure and simple platform that manages the entire transfer process for us.

1. How do I start a stock gift to Ocean City Church?

Begin by visiting [our Charityvest page](#) and clicking the blue “Sign up for Charityvest” button. You’ll create your account and be guided through the process.

2. Why do I need a Charityvest account?

Charityvest creates a *unique brokerage account* specifically for each donor. Because of this, Ocean City Church does not have a general DTC number, account number, or brokerage information to provide.

3. Where do I find the DTC number, account name, and account number my bank is asking for?

After creating your Charityvest account:

- Go to your Dashboard.
- Select *Contribute*.
- Choose *Donate Stocks & ETFs*.

Charityvest will display your *personal transfer instructions*: including the DTC number, account name, and account number. These details are private to your account, so please do not share them with others.

4. How do I complete the stock transfer?

You can:

- Initiate the transfer directly from your brokerage, or
- Send the instructions to your financial advisor

You choose which shares and tax lots to contribute.

5. What happens after the stock is transferred?

Charityvest will:

- Receive the shares
- Sell them automatically (commission-free)
- Deposit the value into your Charityvest fund
- Provide a detailed tax receipt within one business day

You can then direct the funds from your Charityvest account to Ocean City Church.

6. How does Ocean City Church receive the funds?

We receive the funds through electronic transfer via PayPal Grants. Typical processing time is 2 business days.

7. Does Ocean City Church ever see my brokerage information?

No. Charityvest handles the transfer on your behalf, and OCC only receives the final gift you send from your Charityvest fund.

8. Is there a fee to use Charityvest?

Charityvest is free for donors when giving to 501(c)(3) organizations. Stock and ETF liquidations are commission-free.

9. How will I receive a tax receipt for my stock donation?

Charityvest provides your official tax receipt. When stock is transferred to Charityvest, a 501(c)(3) donor-advised fund, your charitable donation is recognized at that moment. You then recommend a grant to Ocean City Church, and Charityvest sends the funds to us electronically. This process is fully IRS-compliant and works the same way as other donor-advised funds like Fidelity Charitable or Schwab Charitable.

10. Who do I contact if I need help?

We're glad to walk with you through the process.

Contact: Lesley Walsh, Director of Operations

Email: lesley@occjax.com