



## **Making a Grant Recommendation through a Donor Advised Fund (DAF)**

A donor advised fund allows you to make a gift that is immediately tax deductible, and then recommend when and to which charity you would like to direct the gift to. If you would like a recommendations for organizations, like the PCA Foundation, that sponsor donor advised funds, please contact our Director of Philanthropic Giving, Ms. Chris Zurbach at [chris.zurbach@genevabenefits.org](mailto:chris.zurbach@genevabenefits.org) or 678.825.1272.

## **How to Recommend a Grant to the Ministerial Relief Fund through a DAF:**

1. Provide the following information to the institution that manages your Donor Advised Fund.

**Legal Name:** Geneva Benefits Group, Inc.

Details: The Relief Fund

*Please note that in 2022, we changed our name from PCA Retirement & Benefits, Inc. to Geneva Benefits Group and continue to use our existing Tax ID # (EIN)*

**Tax ID #:** 74-3069926

**Address:** 1700 North Brown Road, Ste 106  
Lawrenceville, GA 30043

**Contact:** Ms. Chris Zurbach ([chris.zurbach@genevabenefits.org](mailto:chris.zurbach@genevabenefits.org))

**Note:** Please be sure to include if this grant recommendation is for a specific project.

2. Notify our Director of Philanthropic Giving, Ms. Chris Zurbach, when you plan to recommend the grant and kindly include the institution that is issuing the grant as well as the amount.
3. Upon receipt of the grant to the Ministerial Relief Fund, our staff will provide a gift acknowledgement letter to the individual recommending the grant.



Thank you for considering a charitable stock donation to the Relief Fund at Geneva Benefits Group. Geneva Benefits Group can accept most investments; it is important that you consult with your tax advisor on any consequences of this transaction.

Questions about Gift Planning? Please contact our Director of Philanthropic Giving, Ms. Chris Zurbach at 678.825.1272 or [chris.zurbach@genevabenefits.org](mailto:chris.zurbach@genevabenefits.org)

Provide the account information below to your financial professional and they should be able to process the transfer after you complete their requested paperwork.

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**Address:** 1700 North Brown Road, Ste 106  
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### **Securities Transferred Electronically via a Stockbroker:**

Geneva Benefits Group Information:

**Broker Name:** FFC Truist Bank

**Broker DTC #:** 2039

**Geneva Gift Clearing Account #:** 1274006727

**Title of Account:** PCA Retirement and Benefits, Inc. Health and Welfare for Ministerial Relief (PCA H&WBT MREL)

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**Geneva Benefits Group Contact Name and Telephone:** Ms. Chris Zurbach  
678.825.1272

## Securities Transferred via Paper Certificates

**Address:** Geneva Benefits Group  
Attn: Finance  
1700 North Brown Road, Ste 106  
Lawrenceville, GA 30043

For security and delivery, please only send paper certificates via certified mail that requires a signature upon receipt.

To donate mutual funds, please contact [TruistBankGiftClearing@Truist.com](mailto:TruistBankGiftClearing@Truist.com) for delivery instructions. You must include our 10-digit Client Account Number (above) as well as our Account Name (above) and the name of the donor.

### **Additional Instructions:**

Prior to your stock or mutual fund transfer, please contact our Director of Philanthropic Giving, Ms. Chris Zurbach, directly at 678.825.1272 or [chris.zurbach@genevabenefits.org](mailto:chris.zurbach@genevabenefits.org). Please inform us of the Stock Name, Number of Shares, estimated value, and the **name and contact information (phone and address) of the donor.**

If your stock transfer donation is received with no donor information included, your gift will be recorded as an anonymous gift.

*Your charitable deduction will be valued at the median market price on the date of the gift. The legal gift date for certificates that are mailed is the postmark date on the carrier envelope. For securities wired into our account, the legal gift date is the day they are received into our account.*