



Missouri United Methodist Foundation

Securities Transfer Instructions for Donors

(Feel free to make copies of this packet as needed)

Your Missouri United Methodist Foundation offers a service through which donors can make a gift for the benefit of a church, a United Methodist institution, or the Foundation using securities presently held by the donor. We receive the securities, sell them, and then send the proceeds to the intended recipient.

Transferring Securities Held by a Broker or Bank

1. If you do not have physical certificates, your broker or bank can transfer the securities directly to the Foundation's account. Use the form on the reverse side of this page to send instructions to your broker.
2. Send a copy of the broker instructions to the Foundation:

**Missouri United Methodist Foundation
PO Box 1076
Columbia MO 65205-1076**

You may also fax the broker instructions to the Foundation at (573) 875-4595.

3. When the transfer is completed, you will receive a receipt confirming the value of the gift as of the date it is received by the Foundation. Save this receipt for tax purposes.

Transferring Securities Held in Certificate Form

1. If you have physical certificates registered in your name, you will need the following items:
 - The stock certificate(s)
 - An Irrevocable Stock Power (available from the Foundation, phone 800-332-8238)
 - A Third Party Release (available from the Foundation, phone 800-332-8238)
 - A cover letter with your name, address and phone number, as well as a statement identifying the intended recipient and purpose of the gift.
2. Complete ***ONLY*** the Authorized Signature section (highlighted) for the Irrevocable Stock Power and the Third Party Release. **The signatures on each form must correspond exactly to the names appearing on the certificate.** Also, have a Notary Public notarize the Third Party Release form. Upon receipt of these items, the Foundation will fill in the appropriate information on the remainder of each form.
3. Mail the cover letter, the Irrevocable Stock Power and Third Party Release to the Foundation at PO Box 1076 Columbia MO 65205-1076. **For security purposes, we recommend sending the stock certificate(s) to the Foundation in a separate envelope. *DO NOT*** fill out the back of the certificate (this information is already included on the Irrevocable Stock Power).

4. Send the stock certificate(s) to the Foundation:

By U.S. Mail (certified mail suggested)

Missouri United Methodist Foundation
PO Box 1076
Columbia, MO 65205-1076

By UPS, FedEx, Airborne, etc.

Missouri United Methodist Foundation
111 S 9th St, Suite 230
Columbia, MO 65201

5. Upon receipt of the stock certificate(s), the Foundation will send you a receipt confirming the value of the gift as of the date it is received. Save this receipt for tax purposes.



Missouri United Methodist Foundation

Securities Transfer Instructions

(to be used when your broker or bank holds your securities)

**Donors: Please give these instructions to your broker. Also, please fax a copy of this letter to the Foundation at (573) 875-4595 or mail to:
Missouri United Methodist Foundation • PO Box 1076 • Columbia, MO 65205-1076**

Date: _____

From: _____
(Shareholder(s)/Donor(s) Name & Address)

Phone: _____

To: _____
(Shareholder(s)/Donor(s) Stockbroker Name & Address)

Phone: _____

RE: Transfer of securities to Missouri United Methodist Foundation

Please initiate a transfer of _____ shares of _____ from account number _____
(Name of Security)

_____ to Missouri United Methodist Foundation, Inc. as a charitable gift. The gift
*(Shareholder(s)/Donor(s)
Brokerage Account Number)*

is for the benefit of _____ and is to be used for the following:
(Name of United Methodist Church or Organization)

(e.g., Pledge, Campaign, Designated Fund, etc.)

Charles Schwab & Co. functions as the custodian of the Foundation's account and will receive and credit the transfer as per these instructions.

DTC Delivery Instructions:

**DTC-eligible securities are to be delivered to DTC Clearing 0164, Code 40.
Delivery must include the following name and Schwab account number:**

**Missouri United Methodist Foundation, Inc.
Stock Gift Pass Through Account
Schwab Account number 6358-8684**

Thank you for your prompt attention to this request.

Shareholder/Donor

Joint Shareholder/Donor