



Securities Transfer Instructions for Donors

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

Your Missouri United Methodist Foundation can assist you in making your gift to any United Methodist church or related charitable organization. We receive the securities, sell them, and then send the net proceeds to the church or charity as you have directed.

Transferring Securities Held by a Broker or Bank

1. Most shares of stock are held in electronic form by your broker or bank. These shares can be easily transferred directly to the Foundation's account. Use the form on the reverse side of this page to send instructions to your broker.
2. Please send a copy of the broker instructions by mail or fax to the Foundation:

Missouri United Methodist Foundation
POBox 1076
Columbia, MO 65205-1076
FAX 573-875-4595
(Or call us at 800-332-8238)

3. When the transfer is completed, you will receive a gift receipt letter confirming the description of the shares and date the shares were received by the Foundation. We include a gift valuation as of the date of receipt. Save this material for your tax reporting purposes.

Transferring Securities Held in Certificate Form

If you have paper certificates registered in your name or the in the name of the church/organization, contact our office at 800-332-8238 or via email at mlite@mumf.org. We will send you forms and instructions necessary to process the certificate(s). (Note: NEVER sign or write on paper certificates.)

Securities Transfer Instructions

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

DONORS: **1) Telephone our office at 800-332-8238 to inform us of your gift**
OR
FAX OR MAIL A COPY OF THIS FORM TO:



PO BOX 1076
COLUMBIA, MO 65205-1076
Fax: 573-875-4595
Email: mlite@mumf.org

2) Give these instructions to your broker

Date: _____

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

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

Phone: _____

Phone: _____

RE: Transfer of securities to Missouri United Methodist Foundation (Tax ID 43-0899770)

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

I authorize my broker or Charles Schwab & Co. to release my donor information to the Missouri United Methodist Foundation, Inc.

Shareholder/Donor

Joint Shareholder/Donor