



## United Methodist Foundation, Inc.

PO Box 1970, 700 Waterfield Ridge Place, Garner NC 27529

(919) 836-0029 • (800) 555-4718 • Fax (919) 836-0092

www.umf-nc.org

### Instructions for Donation of Stock When It Is Held in Street Name (By Broker) for the Donor

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1. Complete the Authorization Form for transfer of stock\* from your account to the account of United Methodist Foundation, Inc., Raleigh, North Carolina.

In most cases, the transfers are sent to the Foundation's Smith Barney account. The Foundation does have accounts with other brokers, and if not, an account will be set up as soon as the Foundation is aware of your intended stock transfer.

Send the original of the Authorization Form to your broker and send a copy to United Methodist Foundation, Inc.

2. Complete the Memorandum of Intention. On this Memorandum, please enter the name of the Charity which will ultimately receive the benefits of your donation. If there is a specific cause or instruction (such as to a Building Fund, etc.), please indicate this information on the Memorandum.
3. It is advised to use Registered or Certified Mail, return receipt requested when returning the following forms.

***Mail To UMF:***

- Copy of Authorization Form (Item #1 above)
- Original of Memorandum of Intention (Item #2)

***Mail to Broker:***

- Original of Authorization Form (Item #1)

4. If you have questions, please call the Foundation at the number listed above.

*\* Please note: If you will be donating shares through an employee stock plan, DRIP account or mutual fund, please contact UMF before completing the enclosed forms. There may be additional steps required to complete the gift.*

# Authorization Form For Stockbroker to Transfer Stock Held in Street Name to Charity Donee's Account

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Donor's Name and Address:

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To: \_\_\_\_\_

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Dear \_\_\_\_\_:

I currently own shares in \_\_\_\_\_  
Corporation, held by you in account number \_\_\_\_\_. As of today's date, I  
hereby transfer all right, title, and interest in \_\_\_\_\_ of those  
shares to United Methodist Foundation, Inc., Raleigh, North Carolina as a charitable  
donation. Please affect this transfer immediately upon your receipt of this letter, and  
give me written confirmation of the transfer, including specification of the name of the  
charitable transferee. Please contact the United Methodist Foundation, Inc., P.O. Box  
1970, Garner, NC 27529 (phone: 919-836-0029) if you have any questions regarding this  
transfer.

Sincerely,

\_\_\_\_\_, Donor

\_\_\_\_\_ Date

SMITH BARNEY

DTC 418

United Methodist Foundation  
Central Account

819-72318

# Memorandum of Intention

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It is my/our intention that my/our gift of \_\_\_\_\_ shares  
of \_\_\_\_\_ stock  
to United Methodist Foundation, Incorporated, Garner, North Carolina,  
on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_,  
benefit \_\_\_\_\_

\_\_\_\_\_.

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Print Name

Donor Address	_____
	_____
Phone	_____
Email (optional)	_____
<b>Broker Information</b> (optional)	
Contact Name	_____
Company Name	_____
Phone	_____
Fax	_____
Email (optional)	_____