



United Methodist Foundation, Inc.

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

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 Morgan Stanley 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.

Failure to follow these instructions or provide UMF with the correct forms will result in a delay of your gift. A Memo of Intent is required by UMF for each stock transaction and must be signed by the donor.

** 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

Donor's Name and Address:

To: _____

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., 700
Waterfield Ridge Place, Garner, NC 27529 (phone: 919-836-0029) if you have any
questions regarding this transfer.

Sincerely,

_____, Donor

_____ Date

Morgan Stanley Smith Barney

DTC 0015

United Methodist Foundation
Central Account

773-121711-534

Memorandum of Intention

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)* _____

Broker Information *(optional)*

Contact Name _____

Company Name _____

Phone _____

Fax _____

Email *(optional)* _____