



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 the Stock Certificate Is Held by the Donor

1. Complete the Donor Letter which states that you have delivered the stock certificates to United Methodist Foundation, Inc. Enter the information about the stock which is requested on the form. Sign the Letter.
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. For the Irrevocable Stock or Bond Power, the stock or bond details will be completed by our broker on your behalf. Complete only the signature and date sections on the top half of the form in the presence of a bank official who can handle a signature guarantee (the lower half of the form). Please inform the bank official that it must include the "*Green Medallion Stamp*." This process is different than that handled through a Notary Public and helps protect you, as owner of the stock, from signature forgery.
4. Do not fill out anything on the back of the stock certificate.
Do not sign the back of the stock certificate.
5. PLEASE NOTE: For security reasons, it is extremely important to send the stock certificates separately from the other paperwork. It is advised to use Registered or Certified Mail, return receipt requested to mail both envelopes.

Envelope A:

- Donor Letter (Item #1 above)
- Memorandum of Intention (Item #2)
- Stock/Bond Power (Item #3)

Envelope B:

- Stock Certificate(s)
(Item #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.

Donor Letter

Date: _____

United Methodist Foundation, Inc.
700 Waterfield Ridge Place
Garner NC 27529

Dear Sir:

I have this _____ day of _____, 20_____

delivered to United Methodist Foundation, Inc., 700 Waterfield Ridge Place, Garner, NC
27529,

_____ shares of _____

_____ stock

represented by the stock certificates listed below.

The above shares represent a charitable contribution I am making to United Methodist
Foundation, Inc. for

_____.

Donor Signature

Print Name

Donor Signature

Print Name

Number of Shares

Certificate Number

Irrevocable Stock or Bond Power

FOR VALUE RECEIVED, the undersigned hereby sell, sign and transfer to

IF STOCK,
COMPLETE THIS
PORTION

_____ shares of the _____ stock of
_____ represented by
Certificate(s) No(s) _____
inclusive, standing in the name of the undersigned on the books
of said Company.

IF BONDS,
COMPLETE THIS
PORTION

_____ bonds of _____
in the principal amount of \$ _____,
No(s) _____ inclusive, standing in the name of
the undersigned on the books of said Company.

The undersigned hereby irrevocably constitute and appoint
_____ attorney to transfer the
said stock or bond(s), as the case may be, on the books of said
Company, with full power of substitution in the premises.

Date _____

Signature _____

Signature _____

Person(s) executing this power sign here

IMPORTANT - Read Carefully: The signature(s) to this Power must correspond with the name(s) as written upon the face of the certificate or bond in every particular without alteration or enlargement or any change whatever.

SIGNATURE GUARANTEED

(Green Medallion Stamp)

By _____

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)	_____