



## United Methodist Foundation, Inc.

PO Box 10955, 1307 Glenwood Ave., Ste. 153, Raleigh NC 27605  
(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

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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)

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

# Donor Letter

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Date: \_\_\_\_\_

United Methodist Foundation, Inc.  
P.O. Box 10955  
Raleigh NC 27605

Dear Sir:

I have this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_  
delivered to United Methodist Foundation, Inc., P.O. Box 10955, Raleigh, NC 27605,  
\_\_\_\_\_ 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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# 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, Raleigh, North Carolina,  
on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_,  
benefit \_\_\_\_\_  
\_\_\_\_\_.

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Donor Signature

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Print Name

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Donor Signature

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Print Name

Donor Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email *(optional)* \_\_\_\_\_

**Broker Information** *(optional)*

Contact Name \_\_\_\_\_

Company Name \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

Email *(optional)* \_\_\_\_\_

# Irrevocable Stock or Bond Power

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

IF STOCK, \_\_\_\_\_ shares of the \_\_\_\_\_ stock of  
COMPLETE THIS \_\_\_\_\_ represented by  
PORTION Certificate(s) No(s) \_\_\_\_\_  
inclusive, standing in the name of the undersigned on the  
books of said Company.

IF BONDS, \_\_\_\_\_ bonds of \_\_\_\_\_  
COMPLETE THIS in the principal amount of \$ \_\_\_\_\_,  
PORTION 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.

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**SIGNATURE GUARANTEED**

*(Green Medallion Stamp)*

By \_\_\_\_\_