



To donate stock to your church, please complete this gift form and mail, fax or email it to the Florida United Methodist Foundation. After receiving this form, the foundation will sell the stock as soon as administratively possible and mail a check to the designated beneficiary. If you have any questions, contact the foundation at 866-363-9673, ext. 7000.

Donor: \_\_\_\_\_

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

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**FOUNDATION'S BROKERAGE INFORMATION**

Morgan Stanley & Co., Inc., Tampa, Florida

DTC #0015

For credit to: Account #745-110425, The Florida United Methodist Foundation, Inc., Income Principal

Phone: 800-282-0655, ext. 2038, Richard Detweiler

**BENEFICIARY INFORMATION**

Church/purpose: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**SECURITIES**

Date of transfer: \_\_\_\_\_

Security: \_\_\_\_\_ Symbol \_\_\_\_\_ No. of shares: \_\_\_\_\_

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**DONOR'S TRANSFERRING BROKER**

Firm: \_\_\_\_\_ DTC #: \_\_\_\_\_

Contact name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## ELECTRONIC TRANSFER

1. If the broker or bank holds the securities, instruct the broker to transfer the securities DTC format [see FOUNDATION'S BROKERAGE INFORMATION at the top of this form for the DTC number]. If transferring mutual funds, please contact the foundation prior to the transfer to verify its ability to sell those funds.
2. Complete this form and mail, fax or email it **on the same day** to:  
Florida United Methodist Foundation  
450 Martin L King Jr Avenue  
Lakeland, FL 33815  
FAX: 863-904-0169  
foundation@fumf.org

**Substantiation of gifts of securities may require keeping a written record of certain information and filing Form 8283 with the donor's Federal Income Tax return.**