



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. 2000.

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, Carla Weidman

BENEFICIARY INFORMATION

Church/purpose: _____

Address: _____

City: _____ State: _____ Zip: _____

SECURITIES

Date of transfer: _____

Security: _____ Symbol _____ No. of shares: _____

Security: _____ Symbol _____ No. of shares: _____

Security: _____ Symbol _____ No. of shares: _____

Security: _____ Symbol _____ No. of shares: _____

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.