



**INSTRUCTIONS**

1. This form is intended for the use of the donor and is to be completed and submitted by the donor.
2. Questions regarding how to complete this form or questions regarding the gift can be directed to the Foundation.
3. **To ensure the donor receives a receipt for tax records, the donor should email or mail a copy of this completed form to the Foundation at the address above.**
4. **IMPORTANT:** To execute the gift, the donor needs to provide the completed copy of this form to his/her broker.
5. **Brokers: please use the following information to ACAT the security(ies) to Merrill Lynch**  
 Brokerage firm: Merrill Lynch  
 Account name: The Virginia United Methodist Foundation  
 Point of contact: Lisa Clark  
 Telephone number: 866-329-5003  
 DTC number: 8862

**DONOR INFORMATION**

Full Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_ Alt Phone: \_\_\_\_\_  
 Address: \_\_\_\_\_

**RECIPIENT CHURCH INFORMATION**

Name: \_\_\_\_\_ GCFA (if known): \_\_\_\_\_  
 Email: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Address: \_\_\_\_\_

**DONATION INSTRUCTIONS**

Anonymous Donation: YES  NO

Name of Security: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Approximate Value: \$ \_\_\_\_\_

Specific Designation YES  NO

Designation Explanation: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**DONOR SIGNATURE**

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

Office Use Only			
Received:	_____	By	_____