



Gift of Publicly Traded Securities

PO Box 5606
Glen Allen, VA 23060
www.vaumfoundation.org
foundation@vaumc.org
804-521-1121

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
Merrill Lynch account number: 55502575

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	