



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

GIFT OF PUBLICLY TRADED SECURITIES

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 address above.
4. To execute the gift, the donor should 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

Name: _____
Address: _____
City: _____ **State:** _____ **Zip:** _____
Email: _____ **Phone:** _____

RECIPIENT CHURCH INFORMATION

Name: _____
Address: _____
City: _____ **State:** _____ **Zip:** _____
Email: _____ **Phone:** _____

DONATION INSTRUCTIONS

Anonymous donation: **Yes** **No**

Name of security: _____

Number of shares: _____

Approximate value: \$ _____

Specific designation: **Yes** **No**

Designation explanation: _____

DONOR SIGNATURE

Donor signature: _____ **Date:** _____

Foundation/DevCo use only			
Date received:	_____	Received by:	_____