



Gift of Publicly Traded Securities

10330 Staples Mill Rd., Suite 300
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	