

METHODIST

F O U N D A T I O N

of North Alabama

Instructions for Gifting Stock

The Methodist Foundation is pleased to assist any donor in gifting stock to their Methodist church, agency, or institution. Stocks should be transferred directly from you to the Methodist Foundation by contacting your broker or bank (see the Foundation's accounts below) or by using [DonateStock.com](https://www.donatestock.com).

All shares will be liquidated. The net proceeds will be distributed as you specify.

The Methodist Foundation charges a 1% fee of the gross proceeds (\$25 minimum; \$500 maximum) for handling this transaction. The 1% includes any fees charged by the transfer agent. The fee is netted against the gross proceeds. [DonateStock.com](https://www.donatestock.com) charges a 3% fee that is netted against the gross proceeds.

A local church or agency liquidating stock at a brokerage firm would likely incur significantly higher fees for this service, especially in the case of small stock gifts. The Foundation is pleased to minimize this cost and assist you in support of your Methodist ministry.

How to Gift Stock

Step 1: Contact your broker to initiate a transfer to one of The Methodist Foundation's brokerage accounts (see listing enclosed) OR create an account with DonateStock.com.

Step 2: Complete the STOCK GIFT NOTIFICATION FORM included herein.

Step 3: Send the complete FORM to the Methodist Foundation

This form must be received by the Foundation in order to forward the proceeds of the sale to your chosen recipient(s).

How to Contact Us

Phone: 205-215-3015

Email: dgardner@methodfound.org

Mailing address:

Methodist Foundation

PO Box 311297

Birmingham, AL 35231-1297

The Methodist Foundation's Accounts

Charles Schwab

DTC # 0164 code 40 Account # 6491-7400

Fidelity

Account # Z50105686

Vanguard

Account # 0052-09933972756

Tax ID # 63-0885244 (also use this to find us if using DonateStock.com)

Methodist Foundation

STOCK GIFT NOTIFICATION

Separate forms are *not* necessary for multiple stocks nor multiple recipients
Goto: methodfound.org/forms for this form and instructions

I have transferred (#) _____ shares of (company) _____ to the Methodist Foundation through:

_____ Broker Transfer to the Methodist Foundation's account – 1% fee

_____ Donatestock.com – 3% fee, find by using EIN 63-885244

I wish for the proceeds to be remitted to _____
(United) Methodist Church/Organization of _____, Alabama
to be applied to _____ (e.g.:pledge, regular budget, building,youth,
missions, special project, etc.).

Donor's Printed Name

Phone #

Donor's Street Address

City, State, Zip

Methodist Foundation account used:

_____ Charles Schwab – DTC # 0164 code 40 - account 6491-7400

_____ Fidelity – account Z50105686

_____ Vanguard – account 0052-09933972756

Donor's Signature

Date

Choose ONE

* eMAIL the completed form to dgardner@methodfound.org

* Text a picture of the completed form to 205-215-3015

* Mail the completed form to: Methodist Foundation, PO Box 311297, Birmingham, AL 35231

Inquiries to: Dana Gardner/205-215-3015/dgardner@methodfound.org