INSTRUCTIONS FOR GIFTING STOCK & SECURITIES

This service is offered as a courtesy to churches and congregation members in the WNC Conference. Please note that although this is a complimentary service of the Foundation, discounted broker commissions and fees are deducted from the sales proceeds before the funds are received by the Foundation.

The donor should instruct their broker to transfer shares electronically via the Depository Trust Company (DTC) as follows:

- Brokerage Firm: Truist Investment Services, Inc. | Phone: (704) 367-7993
- DTC Number: 0226
- Account Name: United Methodist Foundation of WNC, Inc.
- Account Number: WA7-091822

- **A letter of instruction* is required for all gifts**. This letter can be faxed, mailed, or emailed to Andrea Gutiérrez at agutierrez@umfwnc.org. Alternatively, the letter can be submitted online: https://wnc-reg.brtapp.com/UMFStockGift. **The charitable transfer cannot be processed without a letter of instruction.** Note that the donor's broker does not send the donor's name, contact information, or instructions with the transfer.

  ***Example letter of instruction:**

  Please be advised that I am gifting _____shares of _____to the United Methodist Foundation of Western North Carolina, Inc.

  I prefer the donation remain anonymous: _____

  The net proceeds from the sale should be sent to:

  Name of United Methodist church or organization: _____

  Recipient Mailing Address: _____

  Recipient Phone Number: _____

  Gift purpose or restriction, if any: _____

  UMF fund name & account # (if applicable): _____

  Name(s) of Donor: _____ Date: _____

  Donor Mailing Address: _____

  Donor Phone Number: _____

  Donor Email Address: _____

- The recipient organization will be notified of the gift including the donor's name unless there is a request from the donor to remain anonymous.

- A letter of acknowledgment will be provided to the donor for tax purposes.