



**GIFT OF PUBLICLY TRADED STOCK**

10330 Staples Mill Road  
Glen Allen, VA 23058

[www.VAUMFGifts.org](http://www.VAUMFGifts.org)  
[vafoundationumc@vaumc.org](mailto:vafoundationumc@vaumc.org)

804.521.1121 or 1-800-768-6040 ext. 121

**DONOR**

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Email: \_\_\_\_\_ Phone: \_\_\_\_\_

**POINT OF CONTACT IF OTHER THAN DONOR**

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Email: \_\_\_\_\_ Phone: \_\_\_\_\_

**RECIPIENT**

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Email: \_\_\_\_\_ Phone: \_\_\_\_\_

**DONATION INSTRUCTIONS**

Anonymous donation:	Yes	No	Distribute via: <i>(if not selected, a check will be issued)</i> <b>Check</b> <b>Electronic Funds Transfer (EFT)</b> – Submit EFT Form located at: <a href="http://vaumfgifts.org/?pageID=1005">vaumfgifts.org/?pageID=1005</a> <b>Reinvest in Foundation Account #:</b> _____ <b>Account Fund type:</b> <span style="float: right;">Balanced</span> <span style="float: right;">Stock</span> <span style="float: right;">Bond</span> <span style="float: right;">Money Market</span>
Name of stock:	_____		
Number of shares:	_____		
Approximate value:	\$ _____		
Specific designation:	Yes	No	
Designation explanation:	_____ _____ _____		

**INSTRUCTIONS**

- For recipients who do not have an investment account with The Virginia United Methodist Foundation, a one-time per donor daily processing fee of \$25.00 will be deducted from the proceeds.
- To execute your charitable gift, provide the information below to your broker, as well as a copy of this completed form.
- To ensure the donor receives a receipt of the gift for tax records, fax or email this completed form to the contact information located at the top of this page.

<b>Brokerage firm:</b>	Merrill Lynch
<b>Account name:</b>	The Virginia United Methodist Foundation
<b>Financial advisors</b>	Lisa Clark
<b>Telephone number:</b>	866-329-5003
<b>DTC number:</b>	5198