



Instructions for Making a Donation of Stock

As a courtesy service to our depositors and their donors, the Foundation provides facilitation of donations of stock. Stock donations will be processed as follows:

- The donor will complete the attached instruction form and return to our office.
- The donor will instruct their broker to transfer the stock to the Foundation's account.
 - The following information may prove helpful:
 - Financial Institution: Merrill Lynch
 - DTC Number: 8862
 - Account Name: United Methodist Foundation
 - Account Number: 555-02839
 - For further information or questions, please contact:

Lisa Clark
Private Wealth Relationship Manager
Merrill Lynch
101 Bullitt Lane, Suite 400
Louisville, KY 40222
Tel 502-329-5023
Fax 502-638-2547
lisa.m.clark@ml.com

- Upon receipt of the stock in our account, the stock will be liquidated, and the net proceeds will be remitted to the recipient organization pursuant to the donor's instructions.
- Should you have any questions, please feel free to contact our offices at 412-232-0650

To: The United Methodist Foundation of PA
223 Fourth Avenue, Suite 707
Pittsburgh, PA 15222
Phone: (412) 232-0650 Fax: (412) 232-0675

From: Name(s): _____
Address: _____

Phone/email: _____

- Please use this document as authorization to sell the following stock holdings upon receipt into the United Methodist Foundation of PA's account with Merrill Lynch:

- The approximate value of this gift is expected to be \$ _____
- Upon liquidation of these funds, please issue a check payable to:

Name: _____

Address: _____

- In the full amount of the sale? YES NO If NO then \$ _____ **
- If NO: **Please invest the remainder in: _____ (UMF Account Number)

**Please remit the remainder to: _____

Address: _____

- Do we have permission to share your name, as the donor, with the recipient? YES NO

Signature(s): _____ Date: _____

Print Name(s): _____