



## SECURITIES TRANSFER INSTRUCTIONS FOR DONORS

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The Kansas Area United Methodist Foundation offers a service through which donors can make a gift for the benefit of a church, a United Methodist Institution, or the Foundation using securities presently held by the donor. We receive the securities, sell them, and then send the proceeds to the intended recipient.

### **Transferring Securities Held by a Broker or Bank**

*If you do not have physical certificates, your broker or bank can transfer the securities directly to the Foundation's account.*

1. Use the Securities Transfer Form (on page 2) to send transfer instructions to your broker.
2. Notify the Foundation of the transfer by mailing a copy of the form to the Foundation's office:  
**Kansas Area United Methodist Foundation**  
**P.O. Box 605**  
**Hutchinson, Kansas 67504-0605**  
You may also fax the broker instructions to the Foundation at (620) 662-8597.
3. When the transfer is completed, you will receive a receipt confirming the value of the gift as of the date it is received by the Foundation. Save this receipt for tax purposes.

### **Transferring Securities Held in Certificate Form**

If you have physical certificates registered in your name, please contact the Foundation at 888-453-8405 or [foundation@kaumf.org](mailto:foundation@kaumf.org). The Foundation will provide the necessary forms for the transfer.



SECURITIES TRANSFER FORM

Please complete the transfer instructions below to provide to your broker. Notify the Foundation of the gift by phone at 888-453-8405, email at foundation@kaumf.org, fax at 620-662-8597, or mail a copy to the Foundation Office. Failure to notify the Foundation may delay the transfer process.

RE: Transfer of securities to KANSAS AREA UNITED METHODIST FOUNDATION (Tax ID - 48-0697195)

Date: \_\_\_ / \_\_\_ / \_\_\_\_\_

Donor: \_\_\_\_\_  
(Shareholder(s)/Donor(s) Name & Address)

Broker: \_\_\_\_\_  
(Stockbroker Name & Address)

Phone: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Please initiate the following transfer to the Kansas Area United Methodist Foundation:

Name of Security: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Transfer Date: \_\_\_/\_\_\_/\_\_\_

Benefitting Church or Organization: \_\_\_\_\_

Gift is to be used for the following purpose (pledge, campaign, fund, etc.) \_\_\_\_\_

The Commerce Trust Company functions as the custodian of the Foundation's account and will receive and credit the transfer as per these instructions.

DTC Delivery Instructions:

Participant #2170  
Commerce Bank NA ID #26447 (or Affirming Institution number)  
Commerce Bank NA Agent Bank number 26388  
(Please include Commerce account name and number)

Delivery must include the following name and The Commerce Trust Company account number:

Kansas Area United Methodist Foundation, Inc.  
Stock Gift Pass Through Account  
KAUMF-Gift Transfer #75-0227-08-4  
Attn: Dawn Tatum  
1551 N Waterfront Pkwy, PO BOX 637  
Wichita, KS 67201-0637

I authorize my broker or The Commerce Trust Company to release my donor information to the Kansas Area United Methodist Foundation, Inc.

\_\_\_\_\_  
(Shareholder/Donor Signature)

\_\_\_\_\_  
(Joint Shareholder/Donor Signature)