



INSTRUCTIONS FOR GIFTING STOCK & MUTUAL FUNDS

This service is offered as a courtesy to churches and congregation members in the WNC Conference. These steps must be followed to complete the service in a timely manner.

If the donor has shares of stock or mutual funds held in a brokerage account:

Donor should instruct their broker to transfer shares electronically via DTC #0226 to: United Methodist Foundation of WNC, Truist Investment Services – Account #WA7-091822

- A. A letter of instruction* is required for all gifts. This letter can be faxed, mailed, or emailed to Andrea Gutierrez at agutierrez@umfwnc.org. In electronic transferring, the donor's broker does not send the donor's name, contact information, or instructions with the transfer. **Please send a letter of instruction or the charitable transfer cannot be processed.**

*Example of letter of instruction:

Please be advised that I am gifting _____ shares of _____ to the United Methodist Foundation of Western North Carolina, Inc. The proceeds from the sale should be sent to:

Name of United Methodist church, ministry, mission: _____

Recipient Mailing Address: _____

Recipient Phone Number: _____

Name of Donor: _____ **Date:** _____

Donor Mailing Address: _____

Donor Phone Number: _____

Donor Email Address: _____

- B. A check and letter will be mailed to the recipient of the gift. The letter will include the donor's name.
- C. A letter of acknowledgment will be mailed directly to the donor to be used for tax purposes.