



SECURITIES GIFT INFORMATION FORM

Please download and then complete this form to notify FMF of your securities gift PRIOR to initiating the gift through your broker. Then, contact your broker and inform them of your intent to make a gift. Each broker will have their own process and paperwork, some of which may require a medallion guarantee. Information your broker will need from FMF is included below. Securities that are not publicly traded may require additional processing. FMF would be happy to assist and answer your questions. Please call **(800) 325-8975** or email securities@fmfinancial.org.

PLEASE NOTE: We are typically not notified of the donor's name or the designation of the gift when securities arrive in our account. It is therefore essential that you complete this form so we can process your gift in a timely manner. If we do not receive proper notification of a gift, the securities will be sold and the proceeds placed in our gift liquidation account until properly identified.

DONOR INFORMATION:

Donor Name(s) – (name(s) of donor should match name(s) on brokerage account)

Address

()
Telephone Number

Email

GIFT INFORMATION:

Name of Stock

Symbol

Shares

Estimated Date of Transfer

\$ _____
Estimated Amount of Gift

Designation of Gift

I would like my gift to be anonymous: YES NO

Brokerage Firm Name

Broker Name

() _____
Telephone Number

INFORMATION FOR WORKING WITH YOUR BROKER:

You will need to provide your broker with the following information:

Brokerage House: Bank of New York/Pershing
Account Name: The Free Methodist Foundation (nominee name IND Free Meth)
Account Number: H16268015
DTC Number: 0443*

*** If you are gifting mutual funds, you may need to contact FMF for a BIN in addition to a DTC number.**

IMPORTANT: This account information is to be used to make a gift of securities to a **Free Methodist** or **Free Methodist-related ministry**. If you wish to designate your gift to a non-Free Methodist ministry, or to a GuideStream Charitable Gift Fund account, please contact us at 800-325-8975 for the proper account information.

PLEASE SUBMIT THIS FORM TO:
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(800) 325-8975 • FAX (517) 750-2752 • securities@fmfinancial.org