



## 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 Amanda Goedert at [agoedert@umfwnc.org](mailto:agoedert@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.