

Gifts of Stock – Transfer Instructions

Thank you for your generous gift to support your favorite Methodist church or ministry. Please follow the steps below to ensure your gift is credited appropriately.

STEP 1: Please give the following information to your broker.

Broker Information:

Company Name: National Financial Services
 DTC#: 0226
 Account Name: Texas Methodist Foundation
 Account Number: X83-950873

STEP 2: Please complete the following form and return it to Randi Forrest at TMF via email (rforrest@tmf-fdn.org). Forms will not be accepted via fax.

Donor Details

Date:

Full name:	
Address:	
Phone:	
Email:	

Stock Details

Stock name/Ticker:	
# of shares:	

Beneficiary Details

Church name / City:	
TMF account # (optional):	

Notes:

- Stock will be sold once received into the TMF account, pending receipt of the instructions contained in this form.
- The beneficiary (church/agency receiving the gift) will issue the donor acknowledgement receipt.
- Questions? Contact Randi Forrest at 800-933-5502 or rforrest@tmf-fdn.org.