

## 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](mailto:rforrest@tmf-fdn.org).