



**United Methodist Foundation of the
Northern Illinois Conference, Inc.**
155 North Wacker Drive, Suite 4250
Chicago, Illinois 60606
Phone: 312-803-4801
Email: accounts@umfnic.org

**SEND THIS
FORM TO
YOUR STOCK
BROKER**

ELECTRONIC TRANSFER AUTHORIZATION FORM

Please transfer the listed securities as a donation from my account to the United Methodist Foundation’s account with TD Ameritrade using the following information:

TD Ameritrade, Inc., Attn. DTC Transfers
200 South 108th Avenue, Omaha, NE 68154-2631

For Further Credit to: United Methodist Foundation of the Northern Illinois Conference, Inc.
Tax ID #36-2317623 • DTC #0188 • Account #488-885-638 • Please memo: “GIFT”

Donor / Account Owner Brokerage Information

Brokerage Firm Name: _____

Broker’s Personal Name (optional): _____

Donor / Account Owner Personal Information

Account #: _____ Account Owner Phone #: _____

Account Owner Name: _____

(enter the full ownership name(s) on the brokerage account)

Street Address: _____

City: _____ State: _____ Zip Code: _____

Securities Information

Name of Security #1	Ticker Symbol	CUSIP	Number of Shares
_____	_____	_____	_____
Lot Acquisition Date (MM/DD/YYYY): _____		Lot Acquisition Cost: _____	

Name of Security #2	Ticker Symbol	CUSIP	Number of Shares
_____	_____	_____	_____
Lot Acquisition Date (MM/DD/YYYY): _____		Lot Acquisition Cost: _____	

Signed (Donor): _____ **Date Signed:** _____

Signed (Donor, joint owner): _____ **Date Signed:** _____

(Note: Your brokerage firm may require a medallion signature guarantee for securities valued \$10,000+ or other amount.)

Medallion Guarantee Stamp (if necessary):
Contact your broker / bank for assistance.

Contact Rev. Chris Walters, UM Foundation President
(info above), with questions about the transfer process.

Brokerage firms: questions related to TD Ameritrade
receiving the donated securities should be directed to
TD Ameritrade’s phone number: 800-669-3900.

The United Methodist Foundation of the Northern Illinois Conference, Inc. is qualified as a charitable organization under Section 501(c)(3) of the Internal Revenue Code. Contributions to the Foundation are tax-deductible to the extent permitted by law.