



**United Methodist Foundation of the
Northern Illinois Conference, Inc.**
77 West Washington Street, Suite 1820
Chicago, Illinois 60602
Phone: 312-334-0704 • Fax: 312-346-9730
Email: cwalters@umfnic.org

**SEND THIS
FORM TO
THE UM
FOUNDATION**

STOCK GIFT INSTRUCTIONS

I/we hereby authorize the Foundation to sell the stock described below and to distribute the proceeds using the following instructions:

1. _____
Owner of Stock (individual's or joint owner's name, church's or organization's name, or revocable living trust name)
2. _____
Owner's Street Address _____ Owner's City, State _____ Zip code _____
3. _____
Owner's Phone # _____ Owner's Email Address _____
4. _____
Name of Security _____ Ticker Symbol _____ Number of Shares _____
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5. _____
Name of beneficiary church, agency, organization, or fund that will benefit from the sale
6. _____
Address of beneficiary church, agency, organization, or fund that will benefit from the sale
7. _____
How are proceeds to be distributed? For example, a "check" to my local church / beneficiary organization, "deposited" into a church / organization account at the Foundation, or "added" to a Foundation Fund (name the fund above), etc.

If being deposited into the beneficiary's account held at the Foundation, provide:

_____ Account Number _____ Account Name _____ Fund to be invested in _____
8. _____
Specific purpose the proceeds are to be used for (e.g. tithe, pledge, missions, capital campaign, general operations etc.)
9. Is the donor of this gift to remain anonymous? Yes No
10. Any other information about this transaction that the Foundation should know:

I understand that the stock will be sold as soon as practical and the proceeds (less brokerage commission and other possible fees) will be distributed according to my instructions above.

Signature of Owner _____ Date Signed _____ | _____
Signature of Co-Owner (if applicable) _____ Date Signed _____

Mail, fax, or email this form to the Foundation using the contact information on the top of this form.

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.

(Form Rev. 3/9/2017)