



**Midwest Methodist Foundation**  
 155 North Wacker Drive, Suite 4250  
 Chicago, Illinois 60606  
 Phone: 312.803.4801  
 Email: [accounts@midwestmethodist.org](mailto:accounts@midwestmethodist.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 Methodist Foundation's account with Schwab using the following information:

**Charles Schwab & Co., Inc., Attn. DTC Transfers**

**For Further Credit to: Methodist Foundation**

**Tax ID #36-2317623 • DTC #0164 • Account #6744-3387 • 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, Foundation President  
 (info above), with questions about the transfer process.

Brokerage firms: questions related to Schwab  
 receiving the donated securities should be directed to  
 Schwab's brokerage phone number: 866.232.9890.

The Midwest Methodist Foundation is a qualified 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. 6/1/2023)