



Midwest Methodist Foundation
155 North Wacker Drive, Suite 4250
Chicago, Illinois 60606
Phone: 312.803.4801
Email: accounts@midwestmethodist.org

SEND THIS FORM TO THE FOUNDATION

SECURITIES GIFT INSTRUCTIONS

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

1. _____
Owner/Custodian of Securities (individuals, church's or organization's name, or revocable living trust name, etc.)
2. _____
Owner/Custodian Street Address _____ Owner/Custodian City, State Zip code
3. _____
Owner/Custodian Phone # _____ Owner/Custodian Email Address
4. _____ Ticker Symbol _____ Number of Shares
Name of Security

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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 securities 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/Custodian

Date Signed

Co-Owner/Custodian (if applicable)

Date Signed

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

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)