



United Methodist Foundation, Inc.

PO Box 10955, 1307 Glenwood Ave., Ste. 153, Raleigh NC 27605

(919) 836-0029 • (800) 555-4718 • Fax (919) 836-0092

www.umf-nc.org

Instructions for Donation of Stock

When It Is Held in Street Name (By Broker) for the Donor

1. Complete the Authorization Form for transfer of stock* from your account to the account of United Methodist Foundation, Inc., Raleigh, North Carolina.

In most cases, the transfers are sent to the Foundation's Smith Barney account. The Foundation does have accounts with other brokers, and if not, an account will be set up as soon as the Foundation is aware of your intended stock transfer.

Send the original of the Authorization Form to your broker and send a copy to United Methodist Foundation, Inc.

2. Complete the Memorandum of Intention. On this Memorandum, please enter the name of the Charity which will ultimately receive the benefits of your donation. If there is a specific cause or instruction (such as to a Building Fund, etc.), please indicate this information on the Memorandum.
3. It is advised to use Registered or Certified Mail, return receipt requested when returning the following forms.

Mail To UMF:

- Copy of Authorization Form (Item #1 above)
- Original of Memorandum of Intention (Item #2)

Mail to Broker:

- Original of Authorization Form (Item #1)

4. If you have questions, please call the Foundation at the number listed above.

** Please note: If you will be donating shares through an employee stock plan, DRIP account or mutual fund, please contact UMF before completing the enclosed forms. There may be additional steps required to complete the gift.*

Authorization Form For Stockbroker to Transfer
Stock Held in Street Name to Charity Donee's Account

Dear _____:

I currently own shares in _____
Corporation, held by you for my account. As of today's date, I hereby transfer all right,
title, and interest in _____ of those shares to United Methodist
Foundation, Inc., Raleigh, North Carolina as a charitable donation. Please affect this
transfer immediately upon your receipt of this letter, and give me written confirmation
of the transfer, including specification of the name of the charitable transferee; and
please seek instructions from United Methodist Foundation, Inc., P.O. Box 10955,
Raleigh, NC 27605 (phone: 919-836-0029) regarding its wishes for further disposition.

Sincerely,

_____, Donor

_____ Date

SMITH BARNEY

DTC 418

United Methodist Foundation
Central Account

819-72318

Memorandum of Intention

It is my/our intention that my/our gift of _____ shares
of _____ stock
to United Methodist Foundation, Incorporated, Raleigh, North Carolina,
on the _____ day of _____, 20_____,
benefit _____
_____.

Donor Signature

Print Name

Donor Signature

Print Name

Donor Address	_____
Phone	_____
Email (optional)	_____
Broker Information (optional)	
Contact Name	_____
Company Name	_____
Phone	_____
Fax	_____
Email (optional)	_____