



## HOW TO MAKE A GIFT OF STOCK OR SECURITIES TO BENEFIT YOUR CHURCH

### BEFORE A GIFT IS MADE

Please contact the California-Nevada United Methodist Foundation Finance Office (800-863-8750) to let us know you intend to make a gift of securities. This is very important for two reasons:

1. Before accepting securities, we need to ascertain that they are marketable (i.e., traded publicly or OTC). Although unmarketable securities may be accepted, they will provide no immediate benefit and their future benefit is a calculated risk.
2. We need to ensure that, when the securities are transferred, we can immediately identify them as your gift and follow your gift designation.

When contacting CA-NV UM Foundation to advise that you would like to make a gift of securities, we will need to know the amount that you would like to gift to your church.

### HOW TO TRANSFER SECURITIES

The easiest way to gift securities to your church is by instructing your Financial Advisor to make an electronic transfer to California-Nevada United Methodist Foundation's account held at Charles Schwab for California-Nevada United Methodist Foundation xxxx-6688. (See contact information below to obtain the Schwab account number)

- A. Send a letter to your Financial Advisor with instructions to transfer securities from your account to California-Nevada United Methodist Foundation's account, and provide us with a gift letter. (See Sample #1A & #1B Attached).
- B. Alternatively, your Financial Advisor may provide you with a transfer instruction form to use. Send us a gift letter (See Sample #1B Attached) **and** a copy of the instruction letter you send to your Financial Advisor.

### HOW YOUR GIFT WILL BE ACKNOWLEDGED

You will receive an acknowledgment letter from your church that will include the details of your gift.

The California-Nevada United Methodist Foundation retains a service fee of 1% of the gift amount, which will be deducted from the distribution to the church.

*Please consult your financial/tax advisor for guidance on your personal tax circumstances and assistance with the I.R.S. Form 828 (Noncash Charitable Contributions).*

### FOR MORE INFORMATION

*Should you have any questions, please contact the California-Nevada United Methodist Foundation Finance Office*

Cheri Kraus – Finance Director

1535 Farmers Lane, #283, Santa Rosa, CA 95405

Office: 800-863-8750 Email: [cherik@canvumf.org](mailto:cherik@canvumf.org)

**SALE OF STOCK INSTRUCTION LETTER**  
**(Send To Your Financial Advisor)**

1. Send this letter to your Financial Advisor to transfer securities to California-Nevada United Methodist Foundation.
2. Send a copy along with letter #IB to California-Nevada United Methodist Foundation.

**\*If you have any questions, please call Cheri Kraus, Finance Director at 800-863-8750.**

Date: \_\_\_\_\_

Name of Brokerage Firm: \_\_\_\_\_

Address of Firm: \_\_\_\_\_  
\_\_\_\_\_

RE: Account # \_\_\_\_\_

Name of Account: \_\_\_\_\_

**TO WHOM IT MAY CONCERN:**

Please use this letter as your authorization to transfer (# of shares) \_\_\_\_\_ (of stock name)

**To:**

**Charles Schwab for California-Nevada United Methodist Foundation xxxx-6688**

Sincerely:

\_\_\_\_\_  
*Client Name/s – PLEASE PRINT*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Client Signature/s*

\_\_\_\_\_  
*Date*

**GIFT LETTER**  
**(Send To Your Church)**

1. Please consult with a California-Nevada United Methodist Foundation Finance Officer to ensure the gift designation wording below will define your wishes.
2. Send this letter to CANVUMF along with a copy of your letter to your Financial Advisor.

(Date)

Pastor \_\_  
First UMC  
0000 Street  
City, State Zip

This letter is to notify you that I/we advised my/our stockbroker to transfer (# of shares) \_\_\_\_\_  
of (stock name) \_\_\_\_\_ from my/our account to your account held at  
Charles Schwab in the name of California-Nevada United Methodist Foundation xxxx-6688.

My/Our gift is designated for *(insert language for designation for gift use at your church; e.g: First United Methodist Annual Fund, Building for the Future Capital Campaign, Scholarship Endowment, Area of Greatest Need, etc.)*

Sincerely,

\_\_\_\_\_  
*Donor Name/s – PLEASE PRINT*

\_\_\_\_\_  
*Donor Signature/s*

\_\_\_\_\_  
*Donor Daytime Phone Number*

\_\_\_\_\_  
*Donor Email Address*

\_\_\_\_\_  
*Financial Advisor Name/Company Name*

\_\_\_\_\_  
*Financial Advisor Daytime Phone Number*

\_\_\_\_\_  
*Financial Advisor Email Address*