

Wisconsin United Methodist Foundation, Inc.
Toll Free 1-888-903-9863

PROCESSING OF STOCK GIFTS – INSTRUCTIONS FOR YOUR DONOR

Donors wishing to make gifts of appreciated stock to their local church through the Wisconsin United Methodist Foundation, Inc. must begin the process by calling our office toll-free at 1-888-903-9863.

Through our special relationship with our broker, Robert W. BAIRD and Company, we are able to transact these gifts at no commission fee, leaving higher proceeds for your church.

STOCK HELD BY A BROKER

You must work directly with your broker to expedite an electronic transfer of stock to the Foundation's account at BAIRD. Your broker may or may not accept our Electronic Stock Transfer Form (attached). Or if you are not appearing in person at your broker's office, he or she may require that you obtain a "signature guarantee" on our form before the transfer will be executed.

If the attached form is acceptable to your broker, then complete it through the "Donor Notes" section and give it to your broker. Your broker will then initiate an electronic transfer. Please note your broker does not provide us with the detailed information that is on the Electronic Stock Transfer Form. ***Therefore it is very important that you either call our office, or send a copy of the completed Electronic Stock Transfer Form to:***

Wisconsin U M Foundation

P. O. Box 620

Sun Prairie, WI 53590-0620

FAX (608) 837-2492

Your broker will not share your personal information or gift intentions with us. If you do not inform us that you are initiating a stock transfer, we will not be monitoring our BAIRD account for receipt of your shares. This could delay the selling of your shares. In addition, we will not know which United Methodist Church or ministry should receive your gift.

The Foundation will sell your gifted shares and will issue a check to your local church for the full amount of the sale. No commission fee is charged. The Foundation does not attempt to "time" the sale of your stock in a fluctuating market. Shares are sold as soon as we are made aware that they have been received into our account. We will provide donors with a properly executed gift receipt for tax deduction purposes.

{This procedure also works for churches with broker accounts in the church name. A church can convert its stock holdings into cash, and avoid commission expense by going through the Foundation.}

DIRECT REGISTRATION STOCK-HELD BY A TRANSFER AGENT

We've had instances where the company issuing the stock, has contracted with a designated Transfer Agent (generally a large Commercial Bank) to hold the stock issues for investors. In these instances, the investor (donor) should obtain the shares of stock in certificate form. Then follow the procedure for gifting stock certificates.

STOCK CERTIFICATES

Donors having actual physical possession of a paper stock certificate, and wishing to make a gift of the stock to their church, should call our office and we will walk them through the process, and forward the necessary forms to execute the gift.

The stock certificate should not be "signed over" to your church (on the back side). If this is done, a new certificate must be issued, delaying the gifting process.

GIFTS FROM MUTUAL FUND ACCOUNTS

Each Mutual Fund is different. Please call our office. We may need to see a copy of your Mutual Fund Statement to properly advise you on the best way to proceed.

WISCONSIN UNITED METHODIST FOUNDATION

ELECTRONIC STOCK TRANSFER

Toll Free 1-888-903-9863

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If this form is acceptable to your broker, then complete this Statement of Authorization through the "Donor Notes" section and forward it to your broker. Your broker will then initiate the transfer. **It is very important that you also send a copy of this completed form to Wisconsin United Methodist Foundation, P O Box 620, Sun Prairie, WI 53590-0620, FAX (608) 837-2492 for proper crediting of your gift. Brokers do not share your personal information and gift instructions with us.**

I, _____, hereby authorize the transfer of

_____ Shares of _____ Stock to the Wisconsin United Methodist Foundation. I realize that ownership of these shares will be transferred to Wisconsin United Methodist Foundation.

DELIVERY INSTRUCTIONS ARE AS FOLLOWS:

Robert W. Baird & Co. Inc. DTC Code 0547

Robert W. Baird Contact: Julie Kiel

Robert W. Baird Phone: (800) 711-6132

Baird Account #: 8750-6632

Name: WI United Methodist Foundation

Signature and date

Donor Information:

Name: _____

Address: _____

Email: _____ Phone #: _____

Donor Notes:

If proceeds are to be forwarded to your church, then write the name of your church below, as well as any designations or restrictions on your gift. If proceeds are to be deposited to a Foundation account, then give us the name of the Foundation account below.

