



## SECURITIES TRANSFER INSTRUCTIONS FOR DONORS

The Kansas Methodist Foundation offers a service through which donors can make a gift of marketable securities owned by the donor for the benefit of a church, a Methodist-related institution, a permanent endowment fund stewarded by KMF, or the KMF. We receive the securities, sell them, and then make a distribution of the gift to the intended recipient.

**The process was updated in May 2021, so please note the new process.**

### **Transferring Securities Held by a Broker or Bank**

*If you do not have physical certificates, your broker or bank can transfer the securities directly to the Foundation's account.*

1. Use the Securities Transfer Form (on page 2) to send transfer instructions to your broker.
2. Send a copy of the Securities Transfer Form to the Foundation
  - a. By email (digital copy or scan): [info@kansasmethodistfoundation.org](mailto:info@kansasmethodistfoundation.org)
  - b. by mailing a copy of the form to the Foundation's office:

**Kansas Methodist Foundation**  
**P.O. Box 605**  
**Hutchinson, Kansas 67504-0605**
  - c. Or by fax to (620) 662-8597.
3. When the transfer is completed, you will receive a receipt confirming the value of the gift as of the date it is received by the KMF. Save this receipt for tax purposes.

### **Transferring Securities Held in Certificate Form**

If you have physical certificates registered in your name, please contact the Foundation at 888-453-8405 or [info@kansasmethodistfoundation.org](mailto:info@kansasmethodistfoundation.org). The Foundation will provide the necessary forms for the transfer.



SECURITIES TRANSFER FORM

Please complete the transfer instructions below and provide to your broker. Also provide a copy of this form to the KMF: email to info@kansasmethodistfoundation.org, fax to 620-662-8597, or mail a copy to our office. Please call or email if you have any questions. Failure to notify us may delay the transfer process.

RE: Transfer of securities to KANSAS METHODIST FOUNDATION (Tax ID - 48-0697195)

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

Donor: \_\_\_\_\_
(Shareholder(s)/Donor(s) Name & Address)

Broker: \_\_\_\_\_
(Stockbroker Name, Contact Person & Address)

\_\_\_\_\_
\_\_\_\_\_

\_\_\_\_\_
\_\_\_\_\_

Phone: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

Please initiate the following transfer to the Kansas Methodist Foundation:

Name of Security: \_\_\_\_\_

Symbol/Ticker/Cusip: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Transfer Date: \_\_\_ / \_\_\_ / \_\_\_

Benefitting Church or Organization: \_\_\_\_\_

Gift is to be used for the following purpose (pledge, campaign, fund, etc.) \_\_\_\_\_

Wespath Intuitional Investments functions as the custodian of KMF's account and will receive and credit the transfer as per these instructions.

DTC Delivery Instructions:

Participant #0443
Pershing, LLC
For credit to account #: N7M002242
Client Account Name: Wespath Funds Trust

Delivery must include the following name and account number:

Kansas Area United Methodist Foundation, Inc.
KAUMF-Stock Transfer #1100/125978/05

I authorize my broker or Wespath Institutional Investments to release my donor information to the Kansas Methodist Foundation.

\_\_\_\_\_  
(Shareholder/Donor Signature)

\_\_\_\_\_  
(Joint Shareholder/Donor Signature)