



SECURITIES TRANSFER INSTRUCTIONS FOR DONORS

The Kansas Methodist Foundation offers a service through which you can make a gift of marketable securities you own 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 March 2022, so please note the new online 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 KMF's account.

1. Use the securities transfer information below to send transfer instructions to your broker.

Broker Institution: Pershing LLC

Electronic Transfer Number (DTC): 0443

Account Name: Wespeth Funds Trust

Brokerage Account Number: N7M002242

For further credit to: Stock Transfer #1100/125978/05

2. Complete the KMF [online Stock Transfer notification form](#) to let us know of the incoming gift. The form can be found online at <https://kaumf-reg.brtapp.com/stocktransfer>. **Failure to notify KMF may delay the transfer process.** If you have questions or would like to request a paper copy of the form, please contact us at gloria@kansasmethodistfoundation.org or call 620-664-9623.
3. When the transfer is complete, 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 us at 620-664-9623 or gloria@kansasmethodistfoundation.org. We will provide the necessary forms for the transfer.