



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.

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. **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 charitable gift 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.



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 Methodist Foundation, Inc.
KMF-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)