



## 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](https://docs.google.com/forms/d/e/1FAIpQLSe-xs5z4bJD80LDgPxbywaytNcOKE9VZE8-0qy3GbrrAeEcrQ/viewform) to let us know of the incoming gift. The form can be found online at <https://docs.google.com/forms/d/e/1FAIpQLSe-xs5z4bJD80LDgPxbywaytNcOKE9VZE8-0qy3GbrrAeEcrQ/viewform>. **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](mailto: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](mailto:gloria@kansasmethodistfoundation.org). We will provide the necessary forms for the transfer.