



## STOCK DONATION FORM

United Church Funds (UCF) provides stock donation services through our custodian bank, Bank of New York Mellon (BNYM). This service is provided free of charge to allow individual donors a secure and cost-effective opportunity to donate appreciated securities to their local church or preferred charitable organization. While UCF may not be able to provide these services for some securities, most exchange-traded stocks can be easily transferred directly from the donor's brokerage firm to UCF. Please fully complete the following form and send it to UCF via email at [info@ucfunds.org](mailto:info@ucfunds.org). UCF will not be able to process the stock donation without **ALL** the following information:

### DONOR INFORMATION (optional if gift is anonymous):

Donor Name: \_\_\_\_\_ Address (St., City, State, Zip): \_\_\_\_\_  
Email: \_\_\_\_\_ Phone: \_\_\_\_\_

### DONATION INFORMATION (required):

Stock/Company Name to be Transferred/Ticker: \_\_\_\_\_ Approximate # of Shares: \_\_\_\_\_  
Approximate Date of Transfer: \_\_\_\_\_ Approximate Dollar Value: \_\_\_\_\_

### BENEFICIARY CHURCH/ORGANIZATION (required):

Church/Organization Name: \_\_\_\_\_  
Church/Organization Account Number (to be credited with the stock proceeds): \_\_\_\_\_  
City/State: \_\_\_\_\_ Contact Person: \_\_\_\_\_  
Email: \_\_\_\_\_ Phone: \_\_\_\_\_

**NOTE:** UCF does not provide investment advice regarding tax, investment or other considerations for individual donors. We encourage you to speak with your current advisor or other professionals about your financial situation, goals and objectives. Once you have elected your donation option with your advisors, please give the following information to your advisor/broker for processing the stock/security transfer:

**TRANSFER INSTRUCTIONS FOR BROKER/ADVISOR:**

**Transfer Security To:**

BNYM/Pershing LLC

DTC: #0443 Account Number: N7M001442

Account Name: United Church Funds, Inc.

**For Further Credit to:** Church / Organization Name, City and State: \_\_\_\_\_

Please contact United Church Funds with questions by email at [info@ucfunds.org](mailto:info@ucfunds.org) or by phone at 877-806-4989.

Thank you for the opportunity to be of service to your organization!