



## SECURITIES GIFT INFORMATION FORM

Please download and then complete this form to notify FMF of your securities gift PRIOR to initiating the gift through your broker. Then, contact your broker and inform them of your intent to make a gift. Each broker will have their own process and paperwork, some of which may require a medallion guarantee. Information your broker will need from FMF is included below. Securities that are not publicly traded may require additional processing. FMF would be happy to assist and answer your questions. Please call **(800) 325-8975** or email [securities@fmfinancial.org](mailto:securities@fmfinancial.org).

**PLEASE NOTE: We are typically not notified of the donor's name or the designation of the gift when securities arrive in our account.** It is therefore essential that you complete this form so we can process your gift in a timely manner. If we do not receive proper notification of a gift, the securities will be sold and the proceeds placed in our gift liquidation account until properly identified.

### DONOR INFORMATION:

Donor Name(s) – (name(s) of donor should match name(s) on brokerage account)

Mailing Address (please include street address or PO Box, city, state, zip)

( )  
Telephone Number Email

### GIFT INFORMATION:

Name of Stock Symbol

# Shares Estimated Date of Transfer \$ Estimated Amount of Gift

Designation of Gift

I would like my gift to be anonymous:  YES  NO

Brokerage Firm Name Broker Name ( ) Telephone Number

### INFORMATION FOR WORKING WITH YOUR BROKER:

You will need to provide your broker with the following information:

Brokerage House: Bank of New York/Pershing  
Account Name: The Free Methodist Foundation (nominee name IND Free Meth)  
Account Number: H16268015  
DTC Number: 0443\*

**\* If you are gifting mutual funds, you may need to contact FMF for a BIN in addition to a DTC number.**

**IMPORTANT:** This account information is to be used to make a gift of securities to a **Free Methodist or Free Methodist-related ministry**. If you wish to designate your gift to a non-Free Methodist ministry, or to a GuideStream Charitable Gift Fund account, please contact us at 800-325-8975 for the proper account information.

PLEASE SUBMIT THIS FORM TO:  
8050 Spring Arbor Road • PO Box 580 • Spring Arbor, Michigan 49283  
(800) 325-8975 • FAX (517) 750-2752 • [securities@fmfinancial.org](mailto:securities@fmfinancial.org)