



Instructions for Making a Gift of Stocks or Mutual Funds

1. Make these decisions:
 - a. Which securities do you want to donate?
 - b. How many shares or units do you wish to donate?
 - c. Which charity or charities do you want to receive the gift?
 - d. Is there anything specific you want the recipients to use the gift(s) toward?
2. Contact your Stewardship & Gifts Officer:
3. Complete the GIFT OF PUBLICLY TRADED SECURITIES form.
 - a. Complete your name, the date and your address.
 - b. The table in the centre of the page is used to direct where the proceeds from the securities is to be directed.
 - i. AMOUNT: best shown as a percentage of the securities to be gifted to the ORGANIZATION. If only one organization is to receive a gift, this number is 100%.
 - ii. NAME OF ORGANIZATION: the name of the organization(s) to receive the gift(s).
 - iii. ADDRESS OF ORGANIZATION: the mailing address of the organization(s) to receive the gift(s).
 - iv. SPECIAL INSTRUCTIONS: instructions regarding any designated use of the gift. For instance, if the gift is to a congregation, you could designate the gift to be used for operating expenses. If no special instructions are included, the organization can use the gift however they decide.
 - c. Provide the DESCRIPTION OF SECURITIES information. This is fairly self-evident.
 - d. Complete the name and address of your broker and your brokerage account number.
 - e. If you wish to ALSO make a gift directly to the Foundation, please indicate the amount and the area to which you wish the gift to be directed. This is completely optional.
 - f. Sign the back of the form and include your contact information.
 - g. Check the box at the end of the form if you wish your gift to remain anonymous.
4. Following the instructions in bold print on the top of the back page of the form, send the completed form to your broker.
5. Send a copy of the completed form to the United Church Foundation, so that they are aware of the transfer and can be ready to process it. You may either fax the form, or email a picture of the form. The Foundation's email address is at the bottom of the form.
6. Celebrate and feel good about how you are living out your faith through the spiritual practice of generosity!

If you have any questions or concerns, please contact either your Stewardship & Gifts Officer or the Foundation staff, whose contact information is found on the back of the form. (Erik Lo Forte)

Thank-you for your generosity.