

Wisconsin United Methodist Foundation, Inc.
750 Windsor St. Suite #305
Sun Prairie, WI 53590
Phone: 608-837-9582
Toll Free: 1-888-903-9863
FAX: 608-837-2492

PROCESSING OF SECURITY GIFTS – INSTRUCTIONS FOR DONORS

Donors wishing to make gifts of appreciated securities to their local church must begin the process by calling our office toll-free at 1-888-903-9863.

Please note:

The financial institution delivering your security to us **does not** provide us with the detailed information that is on page #3 the Security Transfer Form nor will they *share any of your personal information with us. If you do not inform us that you are initiating a security transfer, we will not be aware of who the donor is, or which United Methodist Church or ministry should receive your gift.* **Therefore it is very important that you notify us by placing a phone call, faxing or mailing a copy of the completed Security Transfer Form to us at our contact information above.**

Through our special relationship with our broker, Robert W. Baird and Company, we are able to transact these gifts at no commission, leaving higher proceeds for your church. The Foundation will sell your gifted shares and will issue a check to your local church for the full amount of the sale. The Foundation does not attempt to “time” the sale of your stock in a fluctuating market. Shares are sold as soon as we are made aware that they have been received into our account. We will provide donors with a properly executed gift receipt for tax deduction purposes.

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IF YOUR SECURITY IS HELD:

AT A BROKERAGE FIRM

1. Complete page #3 Security Transfer Form **IN FULL**.
2. Contact your broker for any additional requirements they may have.
3. Send the original completed Security Transfer Form to your broker.
4. Send a copy of the completed Security Transfer Form to the Foundation.

***This procedure also works for churches with broker accounts in the church name. A church can convert its stock holdings into cash, and avoid commission expense by going through the Foundation.*

STOCK CERTIFICATES – Donating all shares of the stock certificate

Donors that have a stock certificate in their possession **should not** “sign over” the back of the stock certificate.

1. Complete page #3 Security Transfer Form **IN FULL**.
2. Only sign & date page #4 Irrevocable Stock or Bond Power Form. Do not complete any other blanks on this form. The signature(s) must match exactly as they appear on the face of your Stock Certificate.
3. For security purposes, mail your Stock Certificate in one envelope & the two forms (Irrevocable Stock or Bond Power Form, and Security Transfer Form) in a second envelope to: Julie Kiel, Robert W. Baird & Co. Inc., 1539 W. Market St., Mequon WI 53092.
4. Send a copy of the completed Security Transfer Form to the Foundation.

***To donate partial shares of a stock certificate contact the Foundation*

SHARES HELD BY A TRANSFER AGENT, DIRECT REGISTRATION ACCOUNT (DRS) or DIVIDEND REINVESTMENT PLAN (DRIP)

1. Complete page #3 Security Transfer Form **IN FULL**.
2. Complete the following sections of page #5 BAIRD DRIP/DRS Form: Name of Stock, Shareholder Account Number, Name & Address, SSN, Signature of all shareholders & Date. **DO NOT** complete the middle section of this form as it is used by Baird for multiple purposes.
3. Send both forms AND a copy of your account statement to: Julie Kiel, Robert W. Baird & Co. Inc., 1539 W. Market St., Mequon WI 53092.
4. Send a copy of the completed Security Transfer Form to the Foundation.

GIFTS FROM MUTUAL FUND ACCOUNTS

Each Mutual Fund is different. Please call our office ph. 1-888-903-9863. We may need to see a copy of your Mutual Fund Statement to properly advise you on the best way to proceed.

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SECURITY TRANSFER FORM

- 1. Donor completes in full**
- 2. Send original to your broker (the delivering firm) & a copy to the Foundation**

Donor Name(s):

Address:

Email: _____ Phone: _____

Proceeds to be credited to:

Church or Ministry: _____

Address: _____

any designation or restrictions: _____

(Or) deposit to Foundation Account: _____

I, _____, hereby authorize the transfer of

_____ shares of _____ to the
Wisconsin United Methodist Foundation account held at Robert W. Baird & Co., Inc.

Signature and Date

Instructions for Delivering Firm:

Robert W. Baird & Co. Inc.

DTC # 0547

Account: WI United Methodist Foundation

Account #: 8750-6632

Contact: Julie Kiel

Phone: (800) 711-6132

Irrevocable Stock or Bond Power Form
(Only necessary when gifting an actual physical Stock Certificate)



FOR VALUE RECEIVED, the undersigned does (do) hereby sell assign and transfer to

STOCK _____ Shares of the _____ stock of _____ represented by certificate(s) No(s) _____ inclusive, standing in the name of the undersigned on the books of said Company.

BONDS _____ Bonds of _____ in principal amount of \$ _____, No(s) _____ inclusive, standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint _____ attorney to transfer the said stock or bond(s), as the case may be, on the books of said Company, with full power of substitution in the premises.

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G=; B < 9F 9 L _____

L _____
Person(s) executing this power sign(s) here

5Wti bhBc.

d'7cXY. SSSSSSSS



Instructions To Custodian Of Non-Mutual Fund Dividend Reinvestment Plan Accounts (DRIP) & Direct Registration Accounts (DRS)

Transfer Agent: _____ Name of Stock: _____

Shareholder's Account Number: _____

Shareholder's Name & Address: _____

Social Security Number/Taxpayer ID: _____

Robert W. Baird Account Number and Rep Code: Account #: FA Rep Code:

NOTE: If this is an IRA account, you must indicate if movement is:
 DTRF - A transfer from another IRA account
 ROLL - A Rollover from a Qualified Plan

SELECT ONE OPTION
Terminate Shareholder Account
 Issue a Certificate for Full Shares and Check for Fractional
 Please Send Electronically - DTC #0547
Partial Transfer (Do NOT Terminate Account)
 Transfer _____ Shares from DRS/DRIP Plan

Please Issue in the Name Of
 Robert W. Baird & Co. Incorporated

PLEASE MAIL ALL SHARES AND CHECKS TO:
ROBERT W. BAIRD & CO. INCORPORATED
ATTN: CASHIERS DEPT - SECURITIES PROCESSING
PO BOX 672
MILWAUKEE, WI 53201-0672
TAXPAYER ID 39-6037917

I/We Hereby Authorize you to withdraw the shares held in the plan according to the above instructions.

Signature: _____ Date: _____

Signature: _____ Date: _____

Note: Original signatures must be retained and may be requested to complete this request.