



INSTRUCTIONS FOR DONATIONS OF INDIVIDUAL SECURITIES/MUTUAL FUNDS TO THE NEBRASKA UNITED METHODIST FOUNDATION

The **NEBRASKA UNITED METHODIST FOUNDATION** maintains a brokerage account with **Union Bank & Trust Co. in Lincoln, NE** for processing gifts of publicly traded securities and mutual funds. Your gift to The Foundation can be used to benefit any area or specific program of The Foundation, The Nebraska Annual Conference, or local church.

Step 1: Transfer Individual Securities/Mutual Funds:

Gifts of securities traded electronically:

If the shares are held in “street Name” with your broker, the shares can be wire transferred via the DTC wire transfer system. **Provide your broker with the information shown on the top portion of Attachment I.** Your broker will inform you if additional information is required. Please ask that your broker contact, our representative with, **Union Bank & Trust Co. in Lincoln, NE** at 1-402-323-1553 to advise her of the transfer.

Gifts of securities in certificate form:

If you hold the securities in certificate form, you will need to secure stock power forms from the financial institution of your choice. A separate stock power form is needed for each certificate of stock. Be sure to sign the stock power(s) exactly as the name reads on the stock certificate. Do not fill in our name on the stock power. Have the signature(s) on the stock power(s) Medallion guaranteed at the financial institution of your choice. For security purposes, we recommend that you send the stock certificate(s) and the signed stock power(s) in separate envelopes. Also, please complete the bottom portion of Attachment I and mail it with the stock certificate(s) and signed stock power(s) to:

The Nebraska United Methodist Foundation
100 W Fletcher Avenue, Ste 100
Lincoln, NE 68521

*The date of your gift for tax purposes is the date of the postmark on the envelope.

Step 2: Notify The Nebraska United Methodist Foundation

It is very important that you complete, mail, fax or e-mail to us Attachment II so that we can distribute the proceeds according to your wishes and send you an acknowledgement which complies with IRS regulations.

The Nebraska United Methodist Foundation
100 W Fletcher Avenue, Ste 100
Lincoln, NE 68521
(toll free) 877-495-5545
(fax) 402-323-8840
(e-mail) mlogsdon@numf.org

**INSTRUCTIONS FOR
DONATIONS OF INDIVIDUAL SECURITIES/MUTUAL FUNDS
TO THE NEBRASKA UNITED METHODIST FOUNDATION**

ATTACHMENT I

NOTICE TO BROKER FOR ELECTRONIC TRANSFERS

Please transfer: _____ shares of: _____

From account#: _____

I. DTC Eligible Securities (Both NDFS & SDFS)

DTC 2067

Agent Bank Number 59527

Institution Number 59527

Customer Name/ Account # 9968 Nebraska United Methodist Foundation Gifting
Suspense Account

II. Federal Reserve Eligible Securities

ABA 042000314/Fifth Cin/1050

FFC Union Bank & Trust/010033250206

III. Agency Securities

If held at the Federal Reserve please use the Fed instructions listed above.

DTC 2116

Agent Bank Number 10016

Institution Number 59527

A/C# 010033250206

FFC Union Bank & Trust, Customer Name/ Account # 9968 Nebraska United Methodist
Foundation Gifting Suspense Account

IV. PTC Eligible Securities, ie GNMA's

A/C Fifth

FFC Union Bank & Trust/010033250206

V. Euroclear

Euroclear # 97816

AC Bank of New York

FFC Fifth Third Bank

A/C 135500

Print name(s): _____

Donor signature(s): _____

Specify directions for use of gift. (Gifts can be restricted to a specific community and/or program.):

I hereby donate: _____ shares of : _____

The Nebraska United Methodist Foundation
100 W Fletcher Ave Ste 100
Lincoln, NE 68521

(fax) 402-323-8840
(toll free) 877-495-5545
(e-mail) mlogsdon@numf.org

Print name (s): _____

Donor signature(s) _____

Specify directions for use of gift. (Gifts can be restricted to a specific community and/or program):

**INSTRUCTIONS FOR
DONATIONS OF INDIVIDUAL SECURITIES/MUTUAL FUNDS
TO THE NEBRASKA UNITED METHODIST FOUNDATION**

ATTACHMENT II

NOTICE TO THE FOUNDATION OF GIFT OF SECURITIES

Mail, fax or e-mail this page to:

The Nebraska United Methodist Foundation
100 W Fletcher Avenue Ste 100
Lincoln, NE 68521

(fax) 402-323-8840
(e-mail) mlogsdon@numf.org

Name of Donor (s): _____

Address: _____

Phone: _____

Quantity and Stock Donated: _____

Stock is Being Donated:

Electronically? Yes No

If no, certificate mailed to The Nebraska United Methodist Foundation at the above address?

 Yes No

If electronically, donor's broker/agent: _____

Date of Gift: _____

Specify directions for use of gift. (Gifts can be restricted to a specific community and/or program.):

If you have questions, please contact:

The Nebraska United Methodist Foundation
(toll free) 877-495-5545
(Lincoln, NE) 402-323-8844
(e-mail) mlogsdon@numf.org
(website) www.numf.org