



## Donations of Securities and Mutual Funds to NUMF

The Nebraska United Methodist Foundation maintains an account with Union Bank & Trust Company, in Lincoln, Nebraska, 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 within the Foundation, United Methodist Churches and/or ministries within the State of Nebraska.

**Step 1** – Please provide the following information, to ensure that we distribute proceeds according to your wishes and provide an acknowledgement that complies with IRS regulations.

Donor Printed Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Donor's Broker/Agent \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

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

\_\_\_\_\_

I hereby donate \_\_\_\_\_ shares of \_\_\_\_\_

from account number \_\_\_\_\_.

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Donor Signature

**Step 2** – Please complete and sign the upper half of page 2, Notice to Broker. Be sure to indicate whether you are gifting Mutual Funds or Securities.

**Step 3** - Mail, email or fax completed forms to:

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

Email: [mlogsdon@numf.org](mailto:mlogsdon@numf.org)  
Fax: 402-323-8840

If you have any questions, please contact us at 877-495-5545.