



Securities Transfer Donor Information Form

1. Email completed form to diane.weller@dkmnmf.org
2. Provide Delivery Instructions (below) to your broker or delivering firm to initiate the transfer.

Date: _____

Shares: _____ Stock Name: _____ Symbol/CUSIP: _____

Donor Name (s): _____

Address: _____

Email: _____ Phone: _____

Credit proceeds to:

Church, Ministry or Organization: _____

Address: _____

Designation (if any): _____

Please provide:

Name of Brokerage or Delivering Institution: _____

Contact Name/Email Address: _____

WESPATH SECURITY TRANSFER INSTRUCTIONS:

Please instruct your brokerage or delivering institution to transfer securities to:

DTC# 0443

Pershing, LLC

For credit to account #: N7M002242

Client account name: Wespath Funds Trust

OFFICE USE ONLY

Credit to:

MN: Methodist Foundation UM Org Growth Fund Account: XXXXXXXX3539/03

DAK Methodist Foundation UM Org Growth Fund Account: XXXXXXXX2951/02

Wespath Securities Transfer Instructions

Thank you for supporting your church by donating securities. We are happy to assist with the stock transfer process and provide this service commission-free for our donors.

1. Complete the Securities Transfer Donor Information Form below and email a copy to diane.weller@dkmnmf.org so we're able to inform our Wespath Investment Manager of the transfer.
2. Provide the Wespath Security Transfer Instructions to your broker or financial advisor or initiate the transfer. *We are not able to initiate the transfer.*
3. Wespath will inform us when the transfer has been received. We will then notify the donor and send a check for the full amount of the gift to the designated church/ministry. We will also mail a gift receipt letter to the donor.

Please contact me if you have any questions. Thank you again for supporting the ministries of your church.

Diane Weller

Director of Foundation Relations
diane.weller@dkmnmf.org
605-990-7790 * 612-230-3337 (w)

