

Gifts of Stocks and Bonds



TRANSFERRING GIFTS OF STOCKS AND BONDS

Crossroads Medical Mission may receive contributions through stock and bond transfers. The Holston Conference of the United Methodist Church Foundation, Inc. receives and processes these gifts on behalf of Crossroads Medical Mission. The following results in a simple transfer.

ELECTRONIC TRANSFER

If a brokerage firm holds the stock, the donor instructs his/her brokerage firm to transfer the stock and provides the following information:

- ✓ DTC Clearing 0164, Code 40
- ✓ FBO The Holston Conference of the United Methodist Church Foundation, Inc.
- ✓ Account # 12122910
- ✓ Contact the Foundation office at (865) 690-8124 or Crossroads Medical Mission at (276) 466-1600
To let us know the number of shares and the name of the securities to be transferred.

To let us know the donor's name, address and contact information to properly receipt the gift.

The stock will be sold and transferred into the account of Crossroads Medical Mission.

CERTIFICATE TRANSFER

If the donor is holding the stock certificate(s), the donor needs to:

- ✓ Endorse the back of each certificate or sign an IRREVOCABLE STOCK OR BOND POWER form.
- ✓ Send the certificates and the form to

The Holston Conference of the United Methodist Church Foundation, Inc.

P O Box 900

Alcoa, TN 37701-0900

- ✓ It is preferable for the donor to execute the stock power form and send it under separate cover, as this keeps the certificates non-negotiable until the two are brought together.

ADDITIONAL CONTACT INFORMATION

The Holston Conference of the United Methodist
Church Foundation, Inc.

(865) 690-8124

(865) 690-3162 (fax)

Crossroads Medical Mission, Inc.

P O Box 16852

Bristol, VA 24209-6852

(276) 466-1600

(276) 466-2800 (fax)

Paul Bowman, Executive Director

paulbowman@holston.org

Cindy Rockett

Executive Director

cindy@crossroadsmedicalmission.org

Brenda Mills, Account Manager

brendamills@holston.org

EIN # 54-2038877

EIN # 62-1112387



Holston Conference of the
United Methodist Church
Foundation, Inc.

P.O. Box 900
Alcoa, TN 37701
foundation.holston.org

865-690-8124 (phone) 865-690-3162 (fax)

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Brenda Mills
Accounts Manager
brendamills@holston.org

Sharon Watson
Chief Accountant
sharonwatson@holston.org

GIFT OF PUBLICLY TRADED SECURITIES

INSTRUCTIONS

1. This form is intended for the use of the donor and is to be completed and submitted by the donor.
2. Questions regarding how to complete this form or questions regarding the gift can be directed to the Foundation.
3. To ensure the donor receives a receipt for tax records, the donor should email or mail a copy of this completed form to the Foundation address above.
4. To execute the gift, the donor should provide the completed copy of this form to his/her broker.
5. Brokers: please use the following information in ACATS in remitting securities to Charles Schwab.

Brokerage Firm: CHARLES SCHWAB
Account Name: HOLSTON CONFERENCE FOUNDATION
Account Number: 12122910
Phone Number: 865-690-8124
DTC Number: 0164, Code 40

DONOR INFORMATION

Name: _____
Address: _____
City: _____ **State:** _____ **Zip:** _____
Email: _____ **Phone:** _____

RECIPIENT INFORMATION

Name: _____
Address: _____
City: _____ **State:** _____ **Zip:** _____
Email: _____ **Phone:** _____

DONATION INSTRUCTIONS

Anonymous Donation: **Yes** **No**

Name of Security: _____

Number of Shares: _____

Approximate Value: \$ _____

Specific Designation: **Yes** **No**

Designation Explanation: _____

Donor Signature: _____ **Date:** _____

FOUNDATION USE ONLY			
Date received:	_____	Received by:	_____