

To: Friends of the Foundation

Re: Gifts of appreciated securities to the California-Nevada United Methodist Foundation

When you give securities or stocks to the Foundation, you can help strengthen its present and future ministries while achieving tax advantages. Below are some time-saving instructions to help make this type of gift. Please let us know of your intentions, so we can anticipate and properly document your generous gift.

Thank you.

Please fill in the following:

From my account # _____ please transfer the following securities:
_____ to Charles Schwab and Company for a gift to the
California-Nevada United Methodist Foundation.

Signature: _____

Name(s): _____

Address: _____

For carefree, complimentary deliveries from another firm:

Let your financial advisor know of your intentions in writing, and be sure to include:

- Charles Schwab DTC 0164, code 40
- For California-Nevada United Methodist Foundation RZ 2036-2619

For security transfers from another Schwab account:

Simply instruct your Schwab financial consultant in writing to transfer to California-Nevada United Methodist Foundation RZ 2036-2619.

For those with stock certificates:

As different transfer agents have different requirements, call 1-800-863-8750, and we will determine what documents are necessary.

Please send a copy of these instructions to our trust office at 1579 Farmers Lane, #283, Santa Rosa CA 95405. If you have any questions, call the Foundation trust officer at 1-800-863-8750.

Your gift empowers Christ's work in the world.

Sincerely,



Mark Parsons
Executive Director