

To: Members and friends of [your church name here]

Re: Gifts of stock or securities to your local church

When you give securities or stocks to your congregation, you can help strengthen its present and future ministries. Below are some time saving instructions. The California-Nevada United Methodist Foundation offers a service to your church of processing gifts of appreciated assets. Please let us know of your intentions, so we can anticipate and properly document you generous gift.

Please fill in the following:

From my account # _____ please transfer the following securities:
_____ to Charles Schwab and Company through the
California-Nevada United Methodist Foundation, for a **gift** to our local church, [name of your local church].

Signature(s): _____

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:

The address is 1535 Farmers Lane, #283, Attn: Cheri Kraus, Santa Rosa CA 95405. If you have any questions, call the Foundation trust officer, Cheri Kraus, at 1-800-863-8750.

Your gift empowers Christ's work in the world.

Sincerely,

The California-Nevada United Methodist Foundation