

## Instructions for donating stocks or other securities to St Francis

Instruct Broker to transfer shares electronically via DTC #0226 to:  
United Methodist Foundation  
Truist Wealth-account # WA7-091822

You, the donor, must send the following letter by mail or email to:

Amanda Goedert  
United Methodist Foundation Western  
13816 Professional Center Dr.  
Suite 100  
Huntersville, NC 28078  
[agoedert@umfwnc.org](mailto:agoedert@umfwnc.org)

You can just cut off the bottom of this page and mail it or copy and paste it into an email.  
Please send an email to [office@stfrancischarlotte.org](mailto:office@stfrancischarlotte.org) that you have requested a transfer and if you have any special instructions (Undesignated, Asylum Fund ,Memorial, etc) for where you want the money to go.

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Please be advised that I am gifting \_\_\_\_\_ shares of \_\_\_\_\_ to the United Methodist Foundation of Western North Carolina, Inc. The proceeds from the sale of said stock should be sent to:

St Francis United Methodist Church  
4200 McKee Road  
Charlotte, NC 28270  
(704) 846-6177

Name of Donor:

Date:

Donor Mailing Address:

Donor Phone Number:

A check and letter will be mailed to the St Francis UMC. The letter will include the donor's name.

A letter of acknowledgment will be mailed directly to you to be used for tax purposes. The date of the gift is recorded as the date the shares are received by Truist (not the date the order is given to the broker).