

STOCK DONATION FORM

United Church Funds (UCF) provides stock donation services through its custodian, The Bank of New York Mellon Corporation (BNY). This service is offered at no charge and provides donors with a secure and cost-effective way to contribute appreciated securities to their church or other charitable organization. While certain securities may not be eligible for transfer, most exchange-traded stocks can be transferred directly from the donor's brokerage account to UCF.

For your protection, forms containing banking information, account numbers, donor information or other sensitive information should be submitted through [UCF's secure upload page](#) whenever possible. Completed forms may also be submitted by email to UCF Client Services at info@ucfunds.org.

DONOR INFORMATION:

Donor Name: _____ Address (St., City, State, Zip): _____

Email: _____ Phone: _____

DONATION INFORMATION:

Stock Name / Ticker Symbol: _____ Approximate # of Shares: _____

Approximate Date of Transfer: _____ Approximate Dollar Value: _____

BENEFICIARY CHURCH/ORGANIZATION:

Church/Organization Name: _____

Church/Organization Account Number (to be credited with the stock proceeds): _____

City/State: _____ Contact Person: _____

Email: _____ Phone: _____

Important Information: UCF does not provide tax, legal, investment or financial advice to individual donors. Donors should consult their tax advisor, financial advisor, attorney or other professional advisor regarding their individual circumstances and the suitability of any charitable gift.

Once you have determined your preferred gifting strategy, please provide the transfer instructions below to your broker or financial advisor for processing.

TRANSFER INSTRUCTIONS FOR BROKER/ADVISOR:

Transfer Security To:

BNYM/Pershing LLC

DTC: 0443 Account Number: N7M001442

Account Name: United Church Funds, Inc.

For Further Credit To:

Church/Organization Name: _____

UCF Account Number: _____

Questions?

Please contact UCF Client Services at info@ucfunds.org or 877-806-4989.

Thank you for the opportunity to serve your organization.