



## INSTRUCTIONS FOR MAKING A GIFT OF STOCK TO BENEFIT THE UNITED METHODIST FRONTIER FOUNDATION

### **BEFORE MAKING A GIFT:**

Please contact the United Methodist Frontier Foundation (UMFF) to let us know you plan to make a gift of stock. We need to ensure that when the securities are transferred to our broker, we can easily identify your gift.

Maureen Palumberi, Finance Manager at 914-615-2239 or [mpalumberi@umff.org](mailto:mpalumberi@umff.org)  
Dahlyla Jiminez, Investor Relations Associate at 914-615-2025 or [djiminez@umff.org](mailto:djiminez@umff.org)  
Ellen Knudsen, Executive Director at 914-615-2238 or [eknudsen@umff.org](mailto:eknudsen@umff.org)

### **TRANSFERRING SECURITIES:**

The easiest way to gift securities to your church is by instructing your Financial Advisor to make an electronic transfer to the United Methodist Frontier Foundation's account held by Morgan Stanley.

### **WHAT HAPPENS NEXT?**

Once the securities are deposited into the UMFF Morgan Stanley account and sold, we will receive the net proceeds and apply them to the area or ministry that you designated. Any costs and fees charged by Morgan Stanley will be deducted from the selling price of the securities to arrive at the net proceeds.

We will send you an acknowledgement letter that you can use to substantiate this charitable donation for tax purposes.

Do not hesitate to contact us with any questions about the procedures.

Thank you for your generosity!