



## Gifts of Stock – Transfer Instructions

Thank you for your generous gift to support your favorite Methodist church or ministry. Please follow the steps below to ensure your gift is credited appropriately.

**STEP 1:** Please give the following information to your broker.

### Broker Information:

Company Name: National Financial Services  
DTC#: 0226  
Account Name: Texas Methodist Foundation  
Account Number: X83-950873

**STEP 2:** Please complete the following form and return it to Randi Forrest at TMF via email ([rforrest@tmf-fdn.org](mailto:rforrest@tmf-fdn.org)) or fax (512-331-0670).

### Donor Details

Full name:	
Address:	
Phone:	
Email:	

### Stock Details

Stock name/Ticker:	
# of shares:	

### Beneficiary Details

Church name / City:	
TMF account # (optional):	

### Notes:

- Stock will be sold once received into the TMF account, pending receipt of the instructions contained in this form.
- The beneficiary (church/agency receiving the gift) will issue the donor acknowledgement receipt.
- Questions? Contact Randi Forrest at 800-933-5502 or [rforrest@tmf-fdn.org](mailto:rforrest@tmf-fdn.org).