



Methodists Helping Methodists

F O U N D A T I O N

How To Donate Securities To your Church, Ministry or Organization

The Foundation helps churches receive gifts of securities, including stocks, bonds, or other investments. We have a brokerage so that churches do not need to set one up and we understand the intricacies of acknowledging these gifts so that the donor can receive tax benefits. We exist to serve, and we do not benefit from these transactions.

All net proceeds from the sale of the securities are directed to the donor's intended Methodist church, agency, or mission.

Step 1: *Complete the Letter of Intent* The information in this form will tell us which church or agency will receive a check AND enable us to provide the proper IRS acknowledgment for your gift. (NOTE: Without the Letter of Intent, your donation will be delayed. Information about who the donor is or where to send the proceeds is lost in the electronic transfer process.)

Step 2: Tell your broker or custodian to electronically transfer the securities to the Methodists Helping Methodists Foundation:

Foundation's Broker: Paul Kullback, phone: 720-213-3110

Clearing Broker: NATIONAL FINANCIAL SERVICES

100 Crosby Pkwy

Covington KY 41015

Clearing Broker # (Also known as DTC#) 0226

Account # B7Y001180

Account Name: Methodists Helping Methodists Foundation

Account Address: 7350 E Progress Pl Ste 108, Greenwood Village, CO 80111

Step 3: You will receive a letter from us after we have the proceeds from the sale of the stock. This usually takes about **10-14 days** and can take longer in the case of some bonds, mutual funds, or utility stocks. If you have any questions, don't hesitate to contact us: 303-778-6370 or info@mhmf.org.

What Happens Next?

When the securities are sold, the Foundation will acknowledge the donor with a charitable gift receipt that meets IRS requirements. We will contact the church to send the proceeds of the sale to the church. We will also inform the church of the donor's intention about how to use the donation as described in the donor's Letter of Intent.

Thank you for your generous donations!

The Foundation is a registered 501(c)3 Colorado non-profit organization.

**The Foundation reserves the right to approve the intended recipients, making sure that the donor's wishes are in alignment with the mission of the Foundation. Securities will be sold on the next available settlement day as soon as the Foundation is made aware of the transfer. The Foundation will inform the donor of the total settlement of donated securities for tax purposes. Donors should consult with their tax advisor or CPA to determine the allowable charitable deduction. The Foundation is not responsible for a sudden increase or decrease in value of securities and/or the timing of when securities are sold.*

Letter Of Intent

For convenience you may use the form on our website:

<https://mhmf.org/letter-of-intent/>

Or if you prefer, please fill in this form and send the information to:

Methodists Helping Methodists Foundation

7350 E Progress Pl, Ste 108 Greenwood Village, CO 80111

Fax:303.777.6292 Phone: 303.778.6370 infor@mhmf.org

In regard to my recent gift of stock to the Foundation, it is my intent that all proceeds from the sale be placed in the:

Name of Church or Organization* _____

Church Address* _____

Church City* _____ Church State* _____ Church Zip* _____

Purpose of Gift (general, annual pledge, capital campaign, endowment, other)

It is my understanding that the Foundation provides this service to all churches related to the Methodist movement in Colorado, Utah, Wyoming, Montana, and one county in Idaho, and will provide me with necessary tax substantiation forms for this gift.

Donor name(s)* _____

Donor Email* _____

Donor Address* _____

Donor City* _____ Donor State* _____ Donor Zip* _____

I intend to donate the following:

Name of security to be donated* _____

Ticker or Stock Symbol(s): _____

Number of shares*: _____ Approximate \$ Value*: _____

Additional information:

Signature (s) _____ Date _____