Methodists Helping Methodists
FOUNDATION

How To Donate Securities To your Church, Ministry or Organization

Methodists Helping Methodists 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:

Contact: Leigh Baldwin, phone: 315-655-2964, Leigh@leighbaldwin.com
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 the Methodists Helping Methodists Foundation after the proceeds from the sale of the stock are received and processed. 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@mhmfn.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!
Methodists Helping Methodists 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

Regarding my recent gift of stock to the Methodists Helping Methodists 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(s) of security(ies) to be donated _____
Attach list if necessary

Ticker or Stock Symbol(s): _____

Number of shares: _____Approximate $ Value: _____

Additional information:

_____

_____

Signature (s) _____ Date_____

Send this to: **Methodists Helping Methodists Foundation**
7350 E Progress Pl, Ste 108
Greenwood Village, CO 80111

Email: info@mhmfn.org
Fax: 303.777.6292