

# Gift of Mutual Funds (Electronic)

This form **CANNOT** be used to transfer Stock

Please print legibly.

1. Donor Information Owner/Co-Owner \_\_\_\_\_  
Address \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
Day & Evening Phone \_\_\_\_\_  
E-Mail Address \_\_\_\_\_
2. Broker Info Broker's Name \_\_\_\_\_  
Address \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
Phone Number \_\_\_\_\_
3. Broker Instructions  
Please gift shares of mutual funds from my account per the following:  
Account # \_\_\_\_\_  
Fund Name/Symbol \_\_\_\_\_  
Quantity of Shares \_\_\_\_\_

Please transfer the shares to:  
Parkway United Method Church  
Account Number: Z44921858  
Held at Fidelity Investments  
DTC#: 0226  
Tax ID: 76-0541941

4. Contribution to be applied to the following:
- |   |   |
|---|---|
| Current Year Pledge _____<br>(% of funds received or dollar amount) | Children/Youth Building _____<br>(% of funds received or dollar amount) |
| Ministry/Operating _____<br>(% of funds received or dollar amount)  | Other _____<br>(% of funds received or dollar amount)                   |

5. Signature & Seal
- \_\_\_\_\_  
Owner's signature & date
- \_\_\_\_\_  
Co-Owner's signature & date

<table border="1"><tr><td>Medallion Guarantee</td></tr></table>	Medallion Guarantee
Medallion Guarantee	

Donors may need to have the above signatures Medallion Guaranteed through a bank or stockbroker.  
A notary Public cannot provide a signature guarantee

6. Donor's Final Steps: To ensure a successful funds transfer, please:
- (1) Fax this form to Parkway UMC Accounting – 281-494-5051
  - (2) Provide this original form to your broker.

**Important note to donors:** Due to privacy concerns, your name is not transmitted by your broker to Parkway. Until you communicate with us, Parkway Accounting cannot properly identify you as the donor of the stock. To credit the money received from the sale of your stock to any Fund within Parkway, we need to hear from you. Fax this form to: 281-494-5051. If you have any questions or concerns, please contact Shaan Tippett at 281-494-5050 Ext: 224