



Last Revised: 09/15/2025

## Stock Transfer Instructions

Thank you for your willingness to support the ministries of the Methodist Church through a gift of securities. In order to assure proper handling of your stock contribution, we've developed the following instructions. Stock contributions are handled through the Methodist Foundation for Arkansas (MFA). MFA does not charge a fee for this service and provides you with a substantiation letter for your charitable contribution deduction.

**Please complete this form and then mail, email ([ctrice@methodistfoundationar.org](mailto:ctrice@methodistfoundationar.org)), or fax it to both MFA and your broker:**

The Methodist Foundation for Arkansas, 601 Wellington Village Road, Little Rock, AR 72211

Tax ID # 71-0525462 / FAX #: 501-664-6792 / PHONE: 501-664-8632

### I. BROKER INFORMATION

Your Broker's Name: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

### II. DONOR INFORMATION

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### **III. TRANSFER INSTRUCTIONS (to be supplied to Broker)**

Transfer the securities described above as follows:

All DTC Eligible Securities DTC #: 0725 Raymond James & Associates

Final Credit to: The Methodist Foundation for Arkansas, Account # 561XA460

### **IV. SECURITIES INFORMATION**

Please transfer the following to The Methodist Foundation for Arkansas per the transfer instructions provided above:

Security	# of Shares	Symbol (if available)
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_____	_____	_____
_____	_____	_____
_____	_____	_____

### **V. OTHER INSTRUCTIONS (What should the Foundation do with the gift?)**

After receipt, MFA will liquidate assets and distribute net proceeds according to the contributor's instructions above. MFA will provide the local church and the contributor with a summary of assets received and expenses incurred. MFA will also provide the contributor with a substantiation letter for the charitable contribution. The deduction amount is based on the fair market value of the securities on the date the contributor issues the transfer instructions to his/her broker.

Contributor's Signature

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Date Submitted to Broker

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