



Gift of Stock – Transfer Instructions

Thank you for your generous gift to Saint Matthias Anglican Church. Your contribution will have a significant impact on our ability to provide resources to our community, and we are truly grateful for your support.

In order to facilitate the processing of your giving, please follow the steps below to ensure it is credited appropriately.

Step 1 Donor: Please fill in your information below and give this form to your broker.

Donor Details: _____ Date: _____
Full Name: _____
Address: _____
Phone: _____
Email: _____

Step 2 Donor's Broker: Please complete the information below and return this form to Randi Forrest at TMF via email (rforrest@texasmethodistfoundation.org) copying St. Matthias Treasurer (church@saintmatthiasoakdale.com) and the Donor. Forms will not be accepted via fax.

Stock Details:
Stock Name/Ticker: _____
of shares: _____

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

Beneficiary Details:
Saint Matthias Anglican Church, PO Box 26, Oakdale, Ca 95361
501(c)(3) Non-Profit Organization Tax ID 94-2473681

Notes:

- Stock will be sold once received into the TMF account, pending receipt of the instructions contained in this form.
- St. Matthias Anglican Church will issue the donor acknowledgement receipt. Giving amount will be based on sold price.
- Questions? Contact Randi Forrest at 800-933-5502 or rforrest@texasmethodistfoundation.org