

*sample letter for gifting stock by electronic transfer*  
**(TMF MUST receive a copy of this letter once customized)**

Date:

Name of Brokerage Firm  
Name of Broker  
Street Address  
City, State ZIP

Re: Transfer of stock

Dear \_\_\_\_\_:

We wish to make a charitable donation of \_\_\_ shares of [Name of company] stock to the Texas Methodist Foundation, a recognized 501(c)(3), non-profit organization in Austin, TX. The Foundation's federal tax number is 74-1363741. The proceeds will further benefit [name of church].

*The following instructions may be used to transfer stock to the Texas Methodist Foundation:*

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

Please make the necessary arrangements to transfer this stock to the Foundation. The contact person is Randi Forrest, Investor Services, Texas Methodist Foundation, 11709 Boulder Lane, Suite 100, Austin, TX 78726. Her telephone number is (512) 331-9971 or 800-933-5502.

Sincerely,

\_\_\_\_\_

cc: Randi Forrest  
Texas Methodist Foundation  
[rforrest@tmf-fdn.org](mailto:rforrest@tmf-fdn.org)  
512-331-0670 fax