# Gifts of Stocks and Bonds



# TRANSFERRING GIFTS OF STOCKS AND BONDS

Crossroads Medical Mission may receive contributions through stock and bond transfers. The Holston Conference of the United Methodist Church Foundation, Inc. receives and processes these gifts on behalf of Crossroads Medical Mission. The following results in a simple transfer.

## **ELECTRONIC TRANSFER**

If a brokerage firm holds the stock, the donor instructs his/her brokerage firm to transfer the stock and provides the following information:

- ✓ DTC Clearing 0164, Code 40
- ✓ FBO The Holston Conference of the United Methodist Church Foundation, Inc.
- ✓ Account # 12122910
- ✓ Contact the Foundation office at (865) 690-8124 or Crossroads Medical Mission at (276) 466-1600

  To let us know the number of shares and the name of the securities to be transferred.

To let us know the donor's name, address and contact information to properly receipt the gift.

The stock will be sold and transferred into the account of Crossroads Medical Mission.

#### **CERTIFICATE TRANSFER**

If the donor is holding the stock certificate(s), the donor needs to:

- ✓ Endorse the back of each certificate or sign an IRREVOCABLE STOCK OR BOND POWER form.
- ✓ Send the certificates and the form to

The Holston Conference of the United Methodist Church Foundation, Inc.

P O Box 900

Alcoa, TN 37701-0900

✓ It is preferable for the donor to execute the stock power form and send it under separate cover, as this keeps the certificates non-negotiable until the two are brought together.

### ADDITIONAL CONTACT INFORMATION

The Holston Conference of the United Methodist Church Foundation, Inc.

(865) 690-8124

(865) 690-3162 (fax)

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Crossroads Medical Mission, Inc.

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