

sample letter for gifting stock by electronic transfer

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 Westlake United Methodist Church, Austin, Texas.

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:	Z67-628220

Please make the necessary arrangements to transfer this stock to the Foundation. The contact person is Sara Beltran, 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: Sara Beltran
Texas Methodist Foundation
sbeltran@tmf-fdn.org
512-331-0670 fax