

# ASSURANCE

**GROWING IN JESUS. GOING IN SERVICE.**

## INSTRUCTIONS FOR GIFTING STOCK/MUTUAL FUNDS

If you (donor) have shares of stock or mutual funds held in a brokerage account that you would like to gift to Assurance, then you (donor) should instruct your broker to transfer shares electronically via DTC #062 to Assurance United Methodist Church, Vanguard – account #74787573.

A. A letter of instruction (example below) is required for all gifts. This letter should be emailed to [contributions@assuranceumc.org](mailto:contributions@assuranceumc.org). In electronic transferring, the donor's broker does not send the donor's name, contact information, or instructions with the transfer. For this reason, a letter of instruction is required for the transfer to be processed.

- Example of letter of instruction:

Please be advised that I am gifting number shares of name and symbol of stocks or mutual funds to Assurance United Methodist Church located at 9700 Mount Holly Huntersville Rd, Huntersville, NC 28078. The phone number for Assurance United Methodist Church is 704-391-9567.

Name of Donor: \_\_\_\_\_ Date: \_\_\_\_\_

Donor Mailing Address: \_\_\_\_\_

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

Donor Email Address: \_\_\_\_\_

B. Once the donor's letter of instruction and the gift have been received, Assurance will send a letter of acknowledgment via email directly to the donor to be used for tax purposes. Please note that the date of the gift will be recorded as the date the shares are received by Vanguard (not the date the order is given to the broker).

Thank you so much for your generosity!