



INSTRUCTIONS FOR MAKING A GIFT OF STOCK TO BENEFIT YOUR CHURCH

BEFORE MAKING A GIFT:

Please contact the United Methodist Frontier Foundation (UMFF) to let us know you plan to make a gift of stock. We need to ensure that when the securities are transferred to our broker, we can easily identify your gift.

Maureen Palumberi, Finance Manager at 914-615-2239 or mpalumberi@umff.org
Ellen Knudsen, Executive Director at 914-615-2238 or eknudsen@umff.org

We also have Sample Letters that you can use to send to your Financial Advisor and to your church. Please send us a copy of the gift letter that you send to the church.

TRANSFERRING SECURITIES:

The easiest way to gift securities to your church is by instructing your Financial Advisor to make an electronic transfer to the United Methodist Frontier Foundation's account held by Morgan Stanley using the following transfer information:

Morgan Stanley
DTC Clearing Number: 0015
For Credit to United Methodist Frontier Foundation, Inc.
Account # 409-037943-534

Our broker is:

Mr. Joe Tyrrell Phone 203-625-4637
MS Wealth Management
One Fawcett Place, 3rd Floor
Greenwich, CT 06830

WHAT HAPPENS NEXT?

Once the securities are deposited into the UMFF Morgan Stanley account and sold, we will receive the net proceeds and subsequently will send a check for the same amount to the United Methodist Church or ministry that you designated. Any costs and fees charged by Morgan Stanley will be deducted from the selling price of the securities to arrive at the net proceeds. The Frontier Foundation does not charge any fee for our services in the sale of the stock.

We will send you a letter when we send the proceeds to the church. The church will acknowledge your donation once they receive the check from the Foundation.

Do not hesitate to contact us with any questions about the procedures.

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