

MEMO

TO: Donors
FROM: Lucille Sterling, Executive Director
Desert Southwest United Methodist Foundation
RE: SECURITIES TRANSFER INSTRUCTIONS
Date: January 1, 2015

To electronically transfer stock, bond, or mutual fund assets to the Desert Southwest United Methodist Foundation:

1. Provide us with your complete name, address, city, state, and zip code so that we may send you proper IRS documentation for your gift. You may e-mail or fax (602-265-1524) this information, but ***please notify us before you transfer*** so we can be “on the lookout” for your gift and conduct the necessary transactions as soon as the transfer arrives in our account.

2. Provide your financial advisor with the following information:

A. The Foundation’s Brokerage: Wells Fargo Advisors, L.L.C.
2405 E. Camelback Rd., Suite 1050
Attn: Jim Kinnear or Kurt Reighard
(602) 952-5163 or (602) 808-5667

B. The Brokerage’s DTC Number: 0141

C. Account Name: Desert Southwest United Methodist Foundation

D. Account Number: 2512-2161

E. Foundation’s Tax I.D. #: 86-0621325

3. Instruct your financial Advisor to transfer assets through the DTC system listed in item “B” above and to the account number listed in item “D” above.

4. Via e-mail using the lucille@dsumf.org address, instruct the Desert Southwest United Methodist Foundation as to any designations of the funds realized after our sale of your gifted securities.

THANK YOU

for allowing us the opportunity to provide this service to you free of charge and without expectations because our mission is to provide educational, investment, and consulting services to the churches, agencies, and boards of the Desert Southwest Conference (DSC) so they can fulfill their ministries with a secure financial future.