

## Securities Transfer Instructions

**TO:** Donors  
**FROM:** Anne Green, Executive Director  
**Date:** January 1, 2023



**Desert  
Southwest**

 UNITED METHODIST  
FOUNDATION

To electronically transfer stock to the Desert Southwest United Methodist Foundation you or your financial advisor **must** provide us with the following information:

- Your name and address
- Security name
- Number of shares
- Symbol/ticker/cusip
- Security delivering institution name
- Contact name
- Contact phone number
- Contact email address

In addition, please instruct DSUMF as to any designations of the funds realized after our sale of your gifted securities.

**The above information may be sent to DSUMF  
via e-mail ([agreen@dsumf.org](mailto:agreen@dsumf.org)).**

**All the preceding information must be received at  
least three business days before the expected date of the transfer.**

Please instruct your financial institution to transfer securities to:

DTC #0443  
Pershing, LLC  
For credit to account # N7M002242  
Client account name: Wespeth Funds Trust

Once sold they will further credit DSUMF who will then disburse the funds realized per your designation and send you the documentation for your gift required by the IRS.

**Thank you!**

*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.*