



Holston Conference of the
United Methodist Church
Foundation, Inc.

P.O. Box 900
Alcoa, TN 37701
foundation.holston.org

865-690-8124 (phone) 865-690-3162 (fax)

Rita Broderick
Office Manager
ritabroderick@holston.org

Brenda Mills
Accounts Manager
brendamills@holston.org

Sharon Watson
Chief Accountant
sharonwatson@holston.org

GIFT OF PUBLICLY TRADED SECURITIES

INSTRUCTIONS

1. This form is intended for the use of the donor and is to be completed and submitted by the donor.
2. Questions regarding how to complete this form or questions regarding the gift can be directed to the Foundation.
3. To ensure the donor receives a receipt for tax records, the donor should email or mail a copy of this completed form to the Foundation address above.
4. To execute the gift, the donor should provide the completed copy of this form to his/her broker.
5. Brokers: please use the following information in ACATS in remitting securities to Charles Schwab.

Brokerage Firm: CHARLES SCHWAB
Account Name: HOLSTON CONFERENCE FOUNDATION
Account Number: 12122910
Phone Number: 865-690-8124
DTC Number: 0164, Code 40

DONOR INFORMATION

Name: _____
Address: _____
City: _____ **State:** _____ **Zip:** _____
Email: _____ **Phone:** _____

RECIPIENT INFORMATION

Name: _____
Address: _____
City: _____ **State:** _____ **Zip:** _____
Email: _____ **Phone:** _____

DONATION INSTRUCTIONS

Anonymous Donation: **Yes** **No**

Name of Security: _____

Number of Shares: _____

Approximate Value: \$ _____

Specific Designation: **Yes** **No**

Designation Explanation: _____

Donor Signature: _____ **Date:** _____

FOUNDATION USE ONLY			
Date received:	_____	Received by:	_____