

Tithe your will



How to Donate Securities

Thank you for your intended gift of securities to your chosen United Methodist church, ministry or organization. The Foundation is a service agency incorporated to help the churches of the Conference with such gifts. These gifts could include stocks, bonds, or other investments.

Endowments

Investments

Gift Planning

Loans

The Foundation has a brokerage account already established which eliminates the need for churches of the Conference to have such accounts. We receive up to a 25% discount on the broker's fees. The Foundation exists to serve and does not benefit from these transactions.

All net proceeds from the sale of the securities are directed to the donor's intended United Methodist church, agency or mission.

Step 1: Tell the Foundation to be on the lookout for your donation by contacting us: 303-778-6370 or info@rmumf.org

Step 2: Send the stock to the Foundation's Broker:	Paul Kullback, at 720-213-3110.
Foundation Clearing Broker:	NATIONAL FINANCIAL SERVICES
	100 Crosby Pkwy
	Covington KY 41015
Clearing Broker #	<u>0226</u>
Foundation Account #	<u>B7Y001180</u>

Step 3: Send the Foundation a letter of intent so we know which United Methodist church or agency will receive a check AND so that we can provide the proper IRS acknowledgement for your gift.

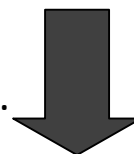
When the securities are sold, the Foundation will acknowledge the donor with a letter that is in compliance with the IRS. The Foundation is a registered 501(c)3 Colorado non-profit organization. The Federal tax id# 84-1095665.

We thank you for your generous donations to help grow God's Kingdom.

We are in God's Service,
Rocky Mountain United Methodist Foundation, Inc.

The Foundation reserves the right to approve the intended recipients, making sure that the donor's wishes are in alignment with the mission of the Foundation. Securities will be sold on the next available settlement day as soon as the Foundation is made aware of the transfer. The Foundation will inform the donor of the total settlement of securities that are donated, however donors should consult with their tax advisor or CPA to determine the allowable charitable deduction for tax purposes. The Foundation is not responsible for a sudden increase or decrease in value of securities and/or the timing of when securities are sold.

**LETTER of INTENT on page 2
Don't forget to send this important information.**



7350 E. Progress Place, Suite 205 Greenwood Village, CO 80111
Office: 303-778-6370 Fax: 303-777-6292 www.RM-UMF.ORG

LETTER OF INTENT

TO: Rocky Mountain United Methodist Foundation, Inc.
7350 East Progress Place, Suite 205
Greenwood Village, CO 80111
Fax 303-777-6292
info@rm-umf.org

Dear Foundation:

In regard to my recent gift of stock to the Foundation, it is my intent that all proceeds from the sale be placed in the:

_____ Name of United Methodist Church or Organization
_____ Church Address
_____ City, State, Zip
_____ Named purpose, if applicable

Check one

Send check directly to the named organization above
 Other Instructions (please print) _____

It is my understanding that the Foundation provides this service to all churches of the Conference and will provide me with necessary tax substantiation forms for this gift.

Sincerely,

Donor Signature Date

Donor Name (printed)

Address, City, State, Zip

Phone and Email

Securities to be donated: _____