



## First United Methodist Church

We invite you to make your contribution to First United Methodist Church (FUMC) through a stock donation. Through our relationship with the Wisconsin United Methodist Foundation (WUMF) and Baird, we are able to transact these gifts at no commission, leaving higher proceeds for our church.

Kelly Walling, FUMC Finance Coordinator, can assist in the transaction. Her contact information is:

Kelly Walling  
203 Wisconsin Avenue  
Madison, WI 53703  
608-338-0158  
[finance@fumc.org](mailto:finance@fumc.org)

Once we receive the forms, we submit them to WUMF who works with Baird to sell the securities. WUMF does not attempt to “time” the sale of your stock in a fluctuating market. Shares are sold as soon as they are received. WUMF/Baird will sell your gifted shares and will issue a check to FUMC for the full amount of the sale. You will receive a properly executed gift receipt for tax deduction purposes.

**For all stock/mutual fund donations, complete the “Security Transfer Form”.** If you would like to designate your contribution to a particular fund, you may do this on the Donor Notes section.

### **If you are transferring actual Stock Certificates:**

Do not “sign over” the back of the certificate. Complete the “Irrevocable Stock or Bond Power Form” with signature(s) only (do not date or complete any other information on this form). Signature(s) must match exactly the way they appear on the face of the Stock Certificate.

For security purposes, mail the Stock Certificate in one envelope, the other two forms (Security Transfer Form and Irrevocable Stock or Bond Power Form) in a second envelope. Or you may bring them to Sarah in the church office.

### **If you are transferring Direct Registration Stock (DRS) or Dividend Reinvestment Plan (DRIP) – shares held by a transfer agent:**

Complete the following sections of the “BAIRD DRIP/DRS form”:  
Name of Stock, Shareholder Account Number, Name & Address, SSN and signature of all shareholders. DO NOT complete the middle section of this form as it is used by Baird for multiple purposes.

### **If you would like to gift shares of a mutual fund account:**

Each Mutual Fund is different. Let us know the name of your mutual fund to properly advise you on the best way to proceed

**SECURITY TRANSFER FORM  
WISCONSIN UNITED METHODIST FOUNDATION**

**COMPLETE IN FULL**

I, \_\_\_\_\_, hereby authorize the transfer of

# \_\_\_\_\_ Shares of \_\_\_\_\_ to the Wisconsin United Methodist Foundation. I realize that ownership of these shares will be transferred to Wisconsin United Methodist Foundation.

**DELIVERY INSTRUCTIONS ARE AS FOLLOWS:**

Robert W. Baird & Co. Inc. DTC # 0547  
Baird Account #: 8750-6632  
Name: WI United Methodist Foundation  
Robert W. Baird Contact: Julie Kiel  
Robert W. Baird Phone: (800) 711-6132

\_\_\_\_\_  
Signature and date

**Donor Information:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_ Phone #: \_\_\_\_\_

**Donor Notes:**

Please forward proceeds to:

First United Methodist Church, 203 Wisconsin Avenue, Madison, WI 53703

My donation should be used for:

\_\_\_ Operations

\_\_\_ Debt Reduction/Building

\_\_\_ Other

Irrevocable Stock or Bond Power Form  
(Only necessary when gifting an actual physical Stock Certificate)



FOR VALUE RECEIVED, the undersigned does (do) hereby sell assign and transfer to

=: **STOCK** 7CA D@9H9'H< =G'DCF H=CB'

\_\_\_\_\_ Shares of the \_\_\_\_\_ stock of \_\_\_\_\_  
 represented by certificate(s) No(s) \_\_\_\_\_ inclusive, standing in  
 the name of the undersigned on the books of said Company.

=: **BONDS** 7CA D@9H9'H< =G'DCF H=CB'

\_\_\_\_\_ Bonds of \_\_\_\_\_ in principal  
 amount of \$\_\_\_\_\_, No(s) \_\_\_\_\_ inclusive,  
 standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint **F cVYfhK "6Ujfx / 7c" =bVdfdcfUHYX** attorney to transfer the said stock or bond(s), as the case may be, on the books of said Company, with full power of substitution in the premises.

8UHYX' \_\_\_\_\_

G=; B' < 9F 9 L \_\_\_\_\_

L \_\_\_\_\_  
*Person(s) executing this power sign(s) here*

5Wti bhBc.

d'7cXY. SSSSSSSS'

BAIRD DRIP/DRS Form

(Only necessary when gifting Direct Registration Stock or Dividend Reinvestment Plan Shares)

Instructions To Custodian Of Non-Mutual Fund Dividend Reinvestment Plan Accounts (DRIP) & Direct Registration Accounts (DRS)



To: \_\_\_\_\_ Name of Stock: \_\_\_\_\_

Shareholders Account Number: \_\_\_\_\_

Shareholders Name & Address: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Social Security Number/Taxpayer ID: \_\_\_\_\_

Robert W. Baird Account Number: 8750-6632

**NOTE:** If IRA Account, you must indicate if this movement is:

- DTRF= A transfer from another IRA account
- ROLL= A rollover from a qualified plan

**Terminate Shareholder Account**

- Issue a Certificate for Full Shares and Check for Fractional
- Please Send Electronically - DTC #0547

**Please Issue In the Name Of**

- Robert W. Baird & Co. Incorporated
- The Shareholder of Record

**Partial Issuance or Sale (Do Not Terminate Account)**

- Issue A certificate for \_\_\_\_\_ Shares
- Sell \_\_\_\_\_ Shares

**PLEASE MAIL ALL SHARES AND CHECKS TO:**

**ROBERT W. BAIRD & CO. INCORPORATED  
ATTN: CASHIERS DEPT / WILMA J. HARRIS or ANNA GERSCHWILER  
P.O. BOX 672  
MILWAUKEE, WI 53201-0672  
TAXPAYER ID 39-6037917**

Attachments: \_\_\_\_\_  
\_\_\_\_\_

I/WE Hereby Authorize You To Withdraw The Shares Held In The Plan According To The Above Instructions.

Signature: \_\_\_\_\_ Date \_\_\_\_\_

Signature: \_\_\_\_\_ Date \_\_\_\_\_