

FIRST PRESBYTERIAN CHURCH, BOULDER CO

GIFT OF MUTUAL FUNDS

This form **CANNOT** be used to transfer stock.

1. Donor Info Owner/Co-Owner _____
Address _____
City/State/Zip _____
Daytime Phone _____

2. Broker Info Broker's Name _____
Address _____
City/State/Zip _____
Phone Number _____

3. Broker Instructions

Please gift shares of mutual funds from my account per the following:

Account # _____
Fund Name/Symbol _____
Quantity of Shares _____

Please transfer the shares to:

First Presbyterian Church of Boulder
Account Number: 3294-8300
Held at Charles Schwab
DTC#: 0164
Tax ID: 84-0427130

4. Contribution to be applied to the following account(s):

General Fund _____ Other(s) _____

5. Signatures & Seal

Owner's Signature & Date

Co-Owner's Signature & Date



Donors may need to have the above signatures medallion guaranteed through a bank or stockbroker. A notary public cannot provide a signature guarantee.

6. Donor's Final Steps: To ensure a successful funds transfer, please:

- 1. Fax this form to First Pres. Boulder (Attn: Accounting) at 303-402-6390
- 2. Provide this original form to your broker

IMPORTANT NOTE TO DONORS: Due to privacy concerns, your name is not transmitted by the broker to First Pres. Boulder to identify you as the donor. For First Pres. Accounting to identify you as the donor for IRS purposes, we rely solely on you faxing this form to us as 303-402-6390.