

# 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:**

**Colonial Baptist Church**  
**Number: 1870-3568**  
**Held at Wells Fargo Advisors LLC**  
**DTC#: 0141**  
**Tax ID: 56-1536585**

**4 Signatures & Seal**

\_\_\_\_\_

**Owner's signature & date**

\_\_\_\_\_

**Co-Owner's signature & date**

- 5 Donor's Final Steps: To ensure a successful funds transfer, please:**
- (1) Scan ([mikemurray@colonial.org](mailto:mikemurray@colonial.org)) or fax (919) 852-5740 this form to Colonial Baptist Church Accounting
  - (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 Colonial Baptist Church to identify you as the donor. For Colonial Baptist Church Accounting to identify you as the donor for IRS purposes, we rely solely on you scanning ([mikemurray@colonial.org](mailto:mikemurray@colonial.org)) or faxing (919) 852-5740 this form to us.