

## **How to Donate Securities: Rocky Mountain United Methodist Foundation, Inc.**

The Foundation has a brokerage account already established which eliminates the need for churches to have such accounts. Our broker charges a small fee to sell the securities. 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, mission, or ministry.***

**Step 1:** Tell the Foundation to of your upcoming donation: 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 # 0226 Foundation Account # B7Y001180

**Step 3:** Send the Foundation a written Letter of Intent (see below)

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. Our tax id is 84-1095665.

*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 business day after receipt by our broker. 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 the securities sale.*

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**LETTER OF INTENT: Mail, email, or fax to Rocky Mountain United Methodist Foundation**  
7350 E Progress Pl, Suite 205, Greenwood Village, CO 80111  
Fax 303-777-6292 info@rmumf.org

Dear Foundation:

Regarding my recent gift of securities to the Rocky Mountain United Methodist Foundation, Inc., it is my intent that all proceeds from the sale be sent to:

\_\_\_\_\_ United Methodist church or organization  
whose address is \_\_\_\_\_  
for the purpose of \_\_\_\_\_.

It is my understanding that the Rocky Mountain United Methodist Foundation will provide me with necessary tax substantiation letter for this gift.

Sincerely,

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Donor Name (printed)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

\_\_\_\_\_  
Securities

\_\_\_\_\_  
Number of shares

\_\_\_\_\_  
Approximate value