

# **Donation of Stocks, Bonds or Mutual Funds**

## **Greenville Unitarian Universalist Fellowship**

### **STEP ONE:**

When you're ready to donate securities (stocks, bonds or mutual funds), contact your broker to transfer the shares directly to the GUUF brokerage account at TD Ameritrade:

**TD Ameritrade for deposit to:  
Greenville Unitarian Universalist Fellowship  
Account #423 576 084, DTC #0188**

IMPORTANT: For maximum tax benefit, do not sell the shares and donate cash.

### **STEP TWO:**

Once you've authorized the transfer, complete this *Intent to Donate Securities* form and send to Bo Boghani, (GUUF Securities Trading Coordinator), 312 Lexington Place Way, Greenville, SC 29615.

Dear Greenville Unitarian Universalist Fellowship, Date \_\_\_\_\_

Please accept my security contribution to the Greenville Unitarian Universalist Fellowship and credit the proceeds as follows:

Donated stock, bond or mutual fund: \_\_\_\_\_

Please distribute the proceeds as follows. Percentages MUST equal 100%

\_\_\_\_\_ to Operating Fund Account, Credit to your Pledge

\_\_\_\_\_ to The General Endowment Fund

\_\_\_\_\_ to Capital Building Fund

You may wish to contribute a dollar amount to one fund and use 'percentage' for any remainder. The value of your contribution is determined on the date your securities arrive at TD Ameritrade. The actual cash received by the Fellowship will depend on the value of your securities at the time of liquidation. The Fellowship assumes cost of liquidation from the TD Ameritrade account.

**UNLESS WE RECEIVE THIS "Intent to donate Securities to GUUF" form, WE ARE UNAWARE OF THE PENDING ARRIVAL OF YOUR DONATION!** This will delay liquidation AND we will be unable to give you timely credit for the donation.

Signature \_\_\_\_\_

Name printed \_\_\_\_\_

Address printed \_\_\_\_\_  
\_\_\_\_\_

Email Address \_\_\_\_\_ Phone Number \_\_\_\_\_

**No goods or services were received in exchange for this contribution.**

Questions: Securities Trading Coordinator, Bo Boghani, [boboghani@gmail.com](mailto:boboghani@gmail.com) or phone: 864-430-2872

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