

## SAMPLE LETTER OF INSTRUCTION

Date

Broker (**HOLDER OF ASSET**)

Address

Address

RE: Your Brokerage Account # \_\_\_\_\_

Dear \_\_\_\_\_:

Please transfer \_\_\_\_\_ (**# of shares**) shares of \_\_\_\_\_ (**name of security**) stock in my account through DTC #0141 for account #1285-2214, FA C863, Wells Fargo Advisors, in the name of the Alabama - West Florida United Methodist Foundation, Inc. A copy of this letter **and** a separate letter of instruction has been forwarded to the Foundation in order to credit \_\_\_\_\_ (**Name of church or organization**) with this gift. If you experience any problems with this transfer, please call Terri Turner at the United Methodist Foundation (334)793-6820.

Thank you in advance for your prompt attention to this matter.

Yours truly,

Donor's Name & Signature

**ASSET TRANSFER NOTIFICATION**

**Donor Name** \_\_\_\_\_

**Donor Address** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Phone Number** \_\_\_\_\_

\*\*\*\*\*

**Security Name** \_\_\_\_\_

**Number of Shares/ Units** \_\_\_\_\_

**Instructions Upon Receipt** \_\_\_\_\_ **Hold** \_\_\_\_\_ **Sell**

\*\*\*\*\*

**Beneficiary of Gift Is:**

\_\_\_\_\_

**(Name of Church or Organization)**

**Additional Instructions:** \_\_\_\_\_

*For tax credit, please mail to:*

*United Methodist Foundation*

*P. O. Box 8066*

*Dothan, AL 36304*

*(334)793-6820*