

## INSTRUCTIONS FOR STOCK GIFTING FORM

Following these instructions is a blank Letter of Instruction that can be used for gifting stock or other securities held in a common brokerage account. Stock held in certificate form will require a different process. If you intend to gift stock certificates, please contact us for further instruction.

If you prefer, feel free to use this as a template to create your own Letter of Instruction.

Once completed and signed, please send form to your broker/advisor and send a copy to the Foundation for our records. Please fax to (501)-376-3831, or mail to:

Arkansas Baptist Foundation  
10 Remington Dr.  
Little Rock, AR 72204

### Form Instructions:

- Fill in Broker name, Firm, and Address (including suite/office number if applicable)
- Input the account number from which the securities will be gifted. Including the account title (most often the owner's name) is optional, but encouraged.
  - Example- John & Jane Doe 000-00000
- Please state the ABF account or Ministry that the gifted securities are to benefit. If more than one, please include percentages or amounts each is to receive.
- List the number of shares and the securities being gifted.
- Print and sign the name of each account owner and include the owner's address and phone number. If owned jointly, both owners will need to print and sign.

### Additional Notes:

Please do not specify a price at which we are to sell the securities. Doing so could have negative tax implications. A gift will be receipted when the securities are transferred into the Foundation's name. You will receive a charitable credit for the mean value of the securities on the day of the transfer. The securities will then be sold immediately at their market prices, unless the charity informs the Foundation *before the gift is made* that they wish to hold the securities in their name.

If you have any questions, feel free to call the Foundation.

Date \_\_\_\_\_

Broker \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Account # \_\_\_\_\_

Please deliver the following securities from the account referenced above to the Arkansas Baptist Foundation as a charitable gift for the benefit of \_\_\_\_\_.

Number of Shares	Name of Company/Fund

Transfer instructions:

Merrill Lynch

DTC 8862

FFC Arkansas Baptist Foundation

Account # 563-02002

Account Owner's Name \_\_\_\_\_ Co-owner's Name \_\_\_\_\_

Account Owner's Signature \_\_\_\_\_

Co-owner's Signature \_\_\_\_\_

Mailing Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone Number (    )- \_\_\_\_\_