



SECURITIES GIFT INFORMATION FORM

To ensure accurate tracking and acknowledgement of your gift, please complete the following form for each gift and submit it to FMF via email, fax, or postal mail PRIOR to initiating the gift through your broker. This form may also be completed online at www.guidestreamdaf.org/resources. Instructions for working with your broker are included below.

PLEASE NOTE: When securities are received, we are typically not notified of the donor's name or the designation of the gift. It is therefore essential that you complete this form. If we do not receive proper notification of a gift, the securities will be sold and the proceeds placed in our gift liquidation account until properly identified.

DONOR INFORMATION:

Donor Name(s) – (name(s) of donor should match name(s) on brokerage account)

Mailing Address (please include street address or PO Box, city, state, zip)

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Telephone Number

Email

GIFT INFORMATION:

Name of Stock

Symbol

Shares

Estimated Date of Transfer

\$

Estimated Amount of Gift

Designation of Gift (please include organization name, address, and specific designation, if any)

I would like my gift to be anonymous: ☐ YES ☐ NO

Stock Broker Name

Brokerage Firm

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Telephone Number

INFORMATION FOR WORKING WITH YOUR BROKER:

A sample letter to initiate the transfer of securities with your broker is provided on the following page. However, each brokerage firm may have its own form for accomplishing a transfer of securities. At a minimum, you will need to provide your broker with the following information:

Brokerage House: Bank of New York/Pershing
Account Name: GuideStream Charitable Gift Fund
Account Number: H16268080
DTC #: 0443
Reference/Comment: Donor Name (to ensure the gift is properly acknowledged)

IMPORTANT: This account information is to be used to make a gift of securities to a GuideStream Donor Advised Funds account (also known as GuideStream Charitable Gift Fund) or one of the ministries/charities we serve. If you have ANY questions about the use of this form, please contact us at 800-325-8975 for further information.

PLEASE SUBMIT THIS FORM TO:

GuideStream Donor Advised Funds • 8050 Spring Arbor Road • PO Box 580 • Spring Arbor, Michigan 49283
(800) 325-8975 • FAX (517) 750-2752 • www.guidestreamdaf.org • info@guidestreamdaf.org



SAMPLE BROKER LETTER REQUESTING SECURITIES TRANSFER FOR GIFT

(Date)

(Name of Custodian of Donor's Investment Account)

(Custodian Address)

(City, State Zip)

Acct: (Donor's Acct #), (Name on the account as it appears on a statement)

To Whom It May Concern:

Please transfer (#shares) of (name of stock/mutual fund) to GuideStream Charitable Gift Fund (doing business as GuideStream Donor Advised Funds) as follows:

Brokerage House: Bank of New York/Pershing
Account Name: GuideStream Charitable Gift Fund
Account Number: H16268080
DTC #: 0443
Reference/Comment: Donor Name (to ensure the gift is properly acknowledged)

Thank you for your assistance with this matter. Please contact me (us) if you have additional questions. You may also contact GuideStream Donor Advised Funds, at 517-750-2727.

Sincerely,

(Donor(s) Signature - – if the account is jointly owned, both owners must sign)

(Donor Name(s) as listed on the account)

(Donor Address)

(City, State Zip)

Your custodian may require a *Medallion Signature Guarantee on this form. A "Medallion Signature Guarantee" is similar but superior to a notary and can be obtained at many local banks. Contact your custodian or local bank branch to find one near you.