

I. DONOR INFORMATION

Is this gift made by an Organization Individual

I/We wish to have our gift remain anonymous.

I/We would like to be acknowledged by email.

INDIVIDUAL INFORMATION: *for gifts made by an individual*

Title First Name Initial Last Name

Title First Name Initial Last Name

Phone: Home Business Mobile Email Address

Address

City State ZIP

Email Address

ORGANIZATION INFORMATION: *for gifts made by an organization*

Organization Name

Phone Email Address

Address

City State ZIP

2. BENEFICIARY INFORMATION

It is my desire to make this irrevocable gift to the Presbyterian Foundation as designated below:

MAKE A DIRECT GIFT TO:

Organization Name

Address

City State ZIP

Restriction, if any

DEPOSIT GIFT INTO EXISTING FUND:

Endowment Fund:

Fund Name Account Number

Donor-Advised Fund:

Fund Name Account Number

Ministry Partnership Fund:

Fund Name Account Number

Note: If you would like to make a gift into an existing endowment fund or donor-advised fund using a debit/credit card or Electronic Funds Transfer (EFT), please visit presbyterianfoundation.org/donate.

3. GIFT INFORMATION

Enclosed is a check for \$ _____

Please make check payable to Presbyterian Foundation.

Qualified Charitable Distribution (QCD)

Not available for DAF Contributions

Amount of \$ _____

IRA Trustee of Custodian _____

Publicly Traded Securities

Instructions for making an irrevocable gift of securities to a Presbyterian-related cause.

1. Contact the Presbyterian Foundation Client Services team to notify us of your intent to make a gift via publicly traded securities.
2. Have the following information available when you contact the Presbyterian Foundation:
 - Your name/address/phone number/email
 - Name of the Financial Institution/Broker transferring the asset
 - The securities being donated and the approximate number of shares
 - Name of the beneficiary
 - Beneficiary fund number at the Presbyterian Foundation (if applicable)

Client Services Contact Information:

Call: 800-858-6127 ext. 3041

Email: clientservices@presbyterianfoundation.org

Fax: 502-805-0466

We are available by phone 8 a.m. to 5 p.m., Monday through Friday, Eastern Time.

Note: We will provide you with detailed securities transfer instructions to share with your broker after we learn more about your gift as described above.

3. Contact your financial institution/broker and provide Securities Transfer Instructions for the Presbyterian Foundation.
4. **Making a year-end gift?** Securities gifts take time to process. If you would like to claim your securities gift as a tax deduction in the current year, we recommend that you notify your Broker/Financial Institution that you would like to donate these securities by December 17. This allows sufficient time to process your gift and record it as a transaction for the current year. Please make sure all other gift types are received by the Foundation by December 29.