

I. DONOR INFORMATION

This gift made by: 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

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: \$ _____

IRA Trustee or Custodian _____

Publicly Traded Securities

Name of Security being gifted

Cusip/Ticker (if known)

Number of Shares

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 16. 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 31.

4. SIGNATURES

Authorized Signature

Date

Authorized Signature

Date