



## Security Transfer Instructions

Securities held at a bank or brokerage account or in certificate form are generally accepted for transfer and investment with First Congregational United Church of Christ of Sarasota's endowment account or a Planned Giving account at United Church Funds (UCF). Mutual fund shares must be liquidated and the proceeds remitted for investment. UCF staff will assist you with this transfer and may suggest additional procedures.

Please contact our Planned Giving Associate, Milly Hernandez, with your intent to make such a transfer, including the security name, CUSIP and number of shares or principal.

**Milly Hernandez**

**Phone: 877-806-4989**

**Email: [plannedgiving@ucfunds.org](mailto:plannedgiving@ucfunds.org)**

### **Please find below some additional guidance on security transfers:**

- Securities held at a bank or brokerage account will require the assistance of UCF staff, working with you and our custodian bank, to complete this transfer. We may suggest additional procedures necessary for transfer.
- Securities held in Certificate Form and any supporting required paperwork will be processed upon receipt of a copy for our verification and will be confirmed with our custodian bank.
- Mutual Fund accounts held by members of First Congregational United Church of Christ of Sarasota must be liquidated by your local broker, with the resulting cash balance remitted for the planned gift.



## Record of Planned Gift Intention

Thank you for completing this confidential Record of Gift Intention.

If you have any questions, please contact the OFFICE ADMINISTRATOR, BOBBI MILLER at 941-953-7044.

Full Name: \_\_\_\_\_

Birth Date: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Planned Gift (Bequest) Information

First Congregational Church is named as a beneficiary of my will or trust:

For a specified amount of \_\_\_\_\_.

\_\_\_\_\_ percentage.

First Congregational Church is named as a beneficiary of the following:

Retirement plan

Life insurance

Bank, investment or other account

Real property

Life-income plan (Trustee's name: \_\_\_\_\_)

My gift is (circle one) RESTRICTED/UNRESTRICTED

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Please return this form to:

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