

# The FOUNDATION for EVANGELISM

## INSTRUCTIONS FOR GIFTING STOCK or MUTUAL FUNDS

The Foundation for Evangelism is grateful for your interest in supporting our ministry through a gift of publicly traded stock or mutual funds. To assist you and your investment consultant in processing this contribution, we provide the following information:

**The donor should instruct their broker to transfer shares electronically via DTC #0226**

**To: The Foundation for Evangelism, Corporate Charitable Account  
Account #Z40315275**

**EIN: 62-6040109**

### **Questions:**

- **Please contact: Jane Boatwright Wood for assistance at (828) 454-6800**
  - **Fidelity Client Services at (800) 343-3548, or**
  - **Fidelity and Fidelity Charitable customers may call (800) 952-4438 with questions**
- A. Most investment consultants can provide you with the letter of instruction form required to complete a transfer.
- B. Your investment consultant/broker does not send the donor's name, contact information, or instructions for using funds with the transfer. When making a stock or mutual fund transfer, please email or mail the following to Jane Wood to appropriately manage your gift.

*Please be advised that I am gifting [number of shares] shares of [name of stock or mutual fund] to The Foundation for Evangelism. The purpose of this gift is to support The Foundation for Evangelism or the [grant program, endowment, or fund name] of The Foundation for Evangelism.*

Without this information sent from you, the donor, The Foundation for Evangelism, cannot properly process your gift or provide the needed documents to meet IRS requirements.