

**UNITARIAN UNIVERSALIST CHURCH of LANCASTER**

Donation of Stock / Bond / Mutual Funds Information Sheet

Name of Donor(s) \_\_\_\_\_ Phone: \_\_\_\_\_

Name of Stock / Mutual Fund / Bond: \_\_\_\_\_

Name of Donor's Brokerage firm: \_\_\_\_\_

Number of Shares / Bonds: \_\_\_\_\_

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

Estimated Proceeds of Sale:

Gross Proceeds at \$ \_\_\_\_\_ per share = \$ \_\_\_\_\_

Distribution of Net Proceeds:

\$ \_\_\_\_\_ to Annual Pledge\*\* Year: \_\_\_\_\_

\$ \_\_\_\_\_ to Endowment Fund or Capital Fund (circle one)

\$ \_\_\_\_\_ to other: \_\_\_\_\_

Footnotes:

\*When mutual fund shares are donated, name of Mutual fund and the telephone number of brokerage firm is required.

\*\* As the net proceeds will not be known until shares are sold, at least one disposition will have to be "balance of proceeds"

Please note: because of new laws regarding the Privacy Act, IT IS VERY IMPORTANT THAT THIS FORM BE RETURNED TO THE CHURCH ADMINISTRATOR. Otherwise we cannot determine who donated the stocks/bonds and to what account it should be credited. TO PROTECT YOUR RIGHTS, WE ARE NOT ABLE TO OBTAIN THIS INFORMATION. Please return this form for proper crediting.