

Wespath Securities Transfer Form Instructions

- Part 2 -The security name, number of shares and cusip if available.
- Part 3 - The name of the Brokerage company or Financial Institution initiating the transfer if applicable. A contact name/email is helpful but not necessary.
- Part 4 – This can be left blank if your church/organization is included on the Stock Donor Information Form. Anticipated date of delivery is not necessary.
- Part 5 - This is the MN Foundation's account with Wespath. The stocks will settle into this account and we are notified by Wespath on the same day the stock is received. We then send a check for the amount of the transfer to the address on Part 4 of the form.

Forward a copy of the Wespath Securities Transfer Form to your broker or financial advisor or initiate the transfer.

Email a copy of the Wespath Form along with the Stock Donor Information Form to diane.weller@dkmnmf.org so I'm able to inform our Wespath investment manager of the transfer.

Please contact me if you have any questions. Thank you supporting the ministries of your church.

Diane Weller

Church Relations Director
612-230-3337 (w)

MINNESOTA
UNITED METHODIST 
FOUNDATION



FOUNDATION

612-230-3337

Fax: 612-230-3673

Donor Information Form

Email this form along with the Wespeth Securities Transfer form to diane.weller@dkmmmf.org

Send Wespeth Securities Transfer Form to your broker or delivering firm.

Date: _____ # Shares: _____ Cusip: _____

Donor Name (s): _____

Address: _____

Email: _____ Phone: _____

Credit proceeds to:

Church, Ministry or Organization: _____

Address: _____

Designation (if any): _____

Instruction Form—Delivery of Equity Securities to Wespath

Part 1 – Identifying Information

Please complete this form when making a deposit via security transfer. This form will be used to indicate where you would like your deposit applied.

Send completed form to MNUMF via

- E-mail to **diane.weller@dkmmf.org**

Organization name

Organization contact name

Phone

Date

E-mail address

Part 2 – Security Information

Security name

Number of shares

Symbol/Ticker/Cusip

Part 3 – Security Delivering Institution Information

Security delivering institution name

Contact name

Phone

E-mail address

Part 4 – Wespath Security Transfer Instructions

Please provide the information on this form at least three business days before the expected date of the transfer.

Anticipated date of delivery

Please instruct your financial institution to transfer securities to:

Notes/Additional instructions

DTC# 0443

Pershing, LLC

For credit to account #: N7M002242

Client account name: Wespath Funds Trust

Funds received by 3:00 p.m., Central time are processed on that business day when U.S. financial markets are open;
funds received after 3:00 p.m., Central time are processed on the following business day when U.S. financial markets are open.

(continued)



Instruction Form—Delivery of Equity Securities to Wespath (continued)

Part 5 – Deposit Instructions

Total amount of deposit _____

Indicate the account(s) to which funds should be deposited:

<input type="checkbox"/>	_____	_____	_____	_____%
	Account name	Account number	Fund	Percent
<input type="checkbox"/>	_____	_____	_____	_____%
	Account name	Account number	Fund	Percent

