



GIFTING SECURITIES FOR THE BENEFIT OF YOUR CHURCH

3801 Eagle Nest Drive, Suite B, Crete, IL 60417 / 888.448.3040 / BarnabasFoundation.com

Use this form and instructions below to contribute publicly traded securities to Barnabas Foundation and have the proceeds from the sale forwarded to your church.

Step 1: Contact your financial advisor/broker about your intent to electronically transfer securities to Barnabas Foundation. Typically, your advisor will have a form for you to complete or request a letter of instruction requiring the following information about Barnabas Foundation’s brokerage account:

Name of Receiving Firm: E*Trade Securities, LLC
DTC: 0385
Account Number: 5550-3250
Receiving Acct Name: Barnabas Foundation, EIN #36-2904503
(NOTE: do not include the name of the church, only list Barnabas Foundation)
E*Trade Contact: platinum2@etrade.com or 1.800.503.9260

Step 2: Notify Barnabas Foundation of your gift by returning this document by e-mail to gifts@BarnabasFoundation.com or call 888.448.3040, ext. 4 to provide information.

Contributor’s Name: _____

Contributor’s Address: _____

Name of Church to receive proceeds from sale: _____

Church Address: _____

Name of Security and/or Symbol* _____ **Number of shares** _____

Name of Security and/or Symbol _____ **Number of shares** _____

Name of Security and/or Symbol _____ **Number of shares** _____

Other information: _____

**If gifting more than 3 securities, please include an additional form.*

If we do not receive notification of a gift, the shares will be liquidated and placed in a holding account until claimed. Unclaimed gifts are transferred to the Barnabas Foundation Operating Fund.

Step 3: Confirm your transfer - Transfers must be initiated by your financial advisor/broker. Please confirm with them that the shares have been transferred from your account to Barnabas Foundation’s account. Barnabas Foundation will provide you a charitable receipt for your contribution including its value for IRS reporting purposes. The church will also receive a copy of the letter. The gift amount for charitable donation purposes will be the average of the high and low share price on the day the share is received.

If your security is held directly at a transfer agent, proprietary mutual fund firm, or in physical certificate form, contact Barnabas Foundation for details on how to transfer your shares.

If you have any questions regarding the gifting of securities, please do not hesitate to contact us at gifts@BarnabasFoundation.com or 888.448.3040, extension 4. We are happy to assist you!