



THE DONOR-ADVISED FUND of The Virginia Baptist Foundation

SECURITIES INSTRUCTION / AUTHORIZATION FORM

1. Send this form (not a copy) to the broker or firm holding your securities using the postage-paid envelope provided.
2. All registered owners of the securities to be donated must sign this form. This form **must** include a signature guarantee with a Medallion (A signature guarantee verifies the authenticity of your signature and may be obtained from a bank or broker.).
3. Deliveries of endorsed physical certificates should be sent to The Donor-Advised Fund of The Virginia Baptist Foundation, 2828 Emerywood Parkway, Richmond, VA 23294.
4. If you have any questions, call the Virginia Baptist Foundation, Inc. at (804) 672-8862 or toll free at (800) 868-2464.

Instructions To Broker Or Firm

Name or Broker or Firm _____

Address _____ Email _____

City _____ State _____ ZIP _____

Phone _____ Depository Trust Company # _____

Dear _____ (Name of Broker or Firm):

Please deliver all eligible securities listed below to The Donor-Advised Fund of The Virginia Baptist Foundation. Securities should be transferred in-kind and are not to be liquidated. Please accept this letter of authorization to name:

_____ as broker/dealer on the following account: The Donor-Advised Fund of

The Virginia Baptist Foundation Account Name _____

Please limit account name to forty (40) characters

Stocks and Bonds to be transferred

Name of Security _____

Account # _____ Percentage Total _____

Name of Security _____

Account # _____ Percentage Total _____

Name of Security _____

Account # _____ Percentage Total _____

Mutual Fund Shares

In order to donate the shares listed below, you must enclose a copy of a recent statement from the fund account holding these shares. We suggest that you call The Donor Advised Fund of The Virginia Baptist Foundation before mailing this form to ensure that the transfer of shares will be executed properly.

Over >

Physical Certificates

Name of Security _____ Quantity-or-All _____

Name of Security _____ Quantity-or-All _____

Name of Security _____ Quantity-or-All _____

Owner's Name _____

Social Security # _____

Joint Owner's Name _____

Owner's Address _____

City _____ State _____ Zip _____ +++ _____

Home Phone _____ Business Phone _____ Cell _____

I have enclosed the physical certificates.

Donor Signature

All owners of the donated assets must complete this section.

I/We hereby irrevocably relinquish all rights, title and interest to the assets listed above. I/We hereby acknowledge that I/we have read and understand the terms of this request to transfer assets and further acknowledge that the terms of this request are binding regardless of any other agreement(s) between me/us and the recipient(s) of these assets.

Owner Signature _____

Owner Name (Please print) _____

Date ____/____/____

Joint Owner Signature _____

Joint Owner Name (Please print) _____

Date ____/____/____

Name of Bank/Firm Providing Signature

Guarantee _____

Signature and Title of Officer _____

Date ____/____/____

**Medallion
Stamp
Here**

Please return this complete application to:



THE DONOR-ADVISED FUND
of The Virginia Baptist Foundation

2828 Emerywood Parkway, Richmond, VA 23294
804.672.8862 · 800.868.2462 · fax 804.672.3747 · tfuller@vbfinc.org