

# GIFT OF MUTUAL FUNDS

This form CANNOT be used to transfer Stock

## 1 Donor Info

Owner/Co-Owner \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Daytime Phone \_\_\_\_\_

## 2 Broker Info

Broker's Name \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

## 3 Broker Instructions

**Please gift shares of mutual funds from my account per the following:**

Account # \_\_\_\_\_

Fund Name/Symbol \_\_\_\_\_

Quantity of Shares \_\_\_\_\_

**Please transfer the shares to:**

**Willow Creek Community Church  
Account Number: X48-232548  
Held at Fidelity Brokerage Services  
DTC#: 0226  
Tax ID: 51-0164942**

## 4 Contribution to be applied to the General Fund for Willow Creek

So Barrington \_\_\_\_\_ Chicago \_\_\_\_\_ DuPage \_\_\_\_\_

Crystal Lake \_\_\_\_\_ North Shore \_\_\_\_\_ Casa de Luz \_\_\_\_\_ Huntley \_\_\_\_\_

## 5 Signatures & Seal

\_\_\_\_\_  
**Owner's signature & date**

\_\_\_\_\_  
**Co-Owner's signature & date**

**Medallion Guarantee**

Donors may need to have the above signatures medallion guaranteed through a bank or stockbroker. A notary public cannot provide a signature guarantee

## 6 Donor's Final Steps: To ensure a successful funds transfer, please:

- (1) Fax this form to Willow Creek Accounting -- fax # (847) 765-0420
- (2) Provide this original form to your broker

**IMPORTANT NOTE TO DONORS:** Due to privacy concerns, your name is not transmitted by the broker to Willow Creek to identify you as the donor. For Willow Creek Accounting to identify you as the donor for IRS purposes, we rely solely on you faxing this form to us at (847) 765-0420