



## I. DONOR INFORMATION

This gift was made by: ☐ Organization ☐ Individual

☐ I/We wish to have our gift remain anonymous.

☐ I/We would like to be acknowledged by email.

### INDIVIDUAL INFORMATION: for gifts made by an individual

|         |   |               |           |
|---------|---|---------------|-----------|
| Title   | First Name  | Initial       | Last Name |
| Title   | First Name  | Initial       | Last Name |
| Phone:  | <input type="checkbox"/> Home <input type="checkbox"/> Business <input type="checkbox"/> Mobile | Email Address |           |
| Address |   |               |           |
| City    | State   | ZIP           |           |

### ORGANIZATION INFORMATION: for gifts made by an organization

|                   |               |     |
|-------------------|---------------|-----|
| Organization Name |               |     |
| Phone             | Email Address |     |
| Address           |               |     |
| City              | State         | ZIP |

## 2. BENEFICIARY INFORMATION

It is my desire to make this irrevocable gift to the Presbyterian Foundation as designated below:

☐ **MAKE A DIRECT GIFT TO:**

|                     |       |     |
|---------------------|-------|-----|
| Organization Name   |       |     |
| Address             |       |     |
| City                | State | ZIP |
| Restriction, if any |       |     |

☐ **DEPOSIT GIFT INTO EXISTING FUND:**

### Endowment Fund:

|           |                |
|-----------|----------------|
| Fund Name | Account Number |
|-----------|----------------|

### Donor-Advised Fund:

|           |                |
|-----------|----------------|
| Fund Name | Account Number |
|-----------|----------------|

## Ministry Partnership Fund:

Fund Name \_\_\_\_\_

Account Number \_\_\_\_\_

**Note:** If you would like to make a gift into an existing endowment fund or donor-advised fund using a debit/credit card or Electronic Funds Transfer (EFT), please visit [presbyterianfoundation.org/donate](https://presbyterianfoundation.org/donate).

### 3. GIFT INFORMATION

☐ **Enclosed is a check for \$** \_\_\_\_\_

*Please make check payable to Presbyterian Foundation.*

☐ **Qualified Charitable Distribution (QCD)**

*Not available for DAF Contributions.*

Amount: \$ \_\_\_\_\_

IRA Trustee or Custodian \_\_\_\_\_

☐ **Publicly Traded Securities**

\_\_\_\_\_  
Name of Security being gifted

\_\_\_\_\_  
Cusip/Ticker (if known)

\_\_\_\_\_  
Number of Shares

Instructions for making an irrevocable gift of securities to a Presbyterian-related cause.

1. Contact the Presbyterian Foundation Client Services team to notify us of your intent to make a gift via publicly traded securities.

**Note: We will provide you with detailed securities transfer instructions to share with your broker after we learn more about your gift as described above.**

2. Contact your financial institution/broker and provide securities transfer instructions for the Presbyterian Foundation.
3. **Making a year-end gift?** Securities gifts take time to process. If you would like to claim your securities gift as a tax deduction in the current year, we recommend that you notify your Broker/Financial Institution that you would like to donate these securities by December 15. This allows sufficient time to process your gift and record it as a transaction for the current year. Please make sure all other gift types are received by the Foundation by December 31.

#### Mail completed form with check to:

Presbyterian Foundation  
200 E. 12th Street  
Jeffersonville, IN 47130

#### Client Services Contact Information:

**Call:** 800-858-6127 ext. 3041

**Email:** [clientservices@presbyterianfoundation.org](mailto:clientservices@presbyterianfoundation.org)

**Fax:** 502-805-0466

**We are available by phone 8 a.m. to 5 p.m.,  
Monday through Friday, Eastern Time.**

### 4. SIGNATURES

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date