



PRESBYTERIAN  
ASSOCIATION OF  
MUSICIANS

## Gifts of Stocks/Securities

To donate publicly traded securities to the Presbyterian Association of Musicians there are two steps: 1) you need to instruct the Presbyterian Foundation to give the proceeds to the Presbyterian Association of Musicians and 2) you need to instruct your broker to transfer the stock to the Presbyterian Foundation.

### 1) Instructions to the Presbyterian Foundation:

Complete the **PF Securities Donation Form** to instruct the Presbyterian Foundation what to do with the stocks once they are received. Complete the form as follows:

- Section 1: your personal information.
- Section 2: at “Ministry Partnership Fund” list the fund(s) to receive gift: Annual, Scholarship, Hopson Service Musician Fund, or First Call Community. Leave the Account Number blank.
- Section 3: select “Publicly Traded Securities” and list them.
- Email the completed form to [clientservices@presbyterianfoundation.org](mailto:clientservices@presbyterianfoundation.org), [pam@pcusa.org](mailto:pam@pcusa.org), and Erin Skinner (our Ministry Relations Officer from the Presbyterian Foundation) at [erin.skinner@presbyterianfoundation.org](mailto:erin.skinner@presbyterianfoundation.org).

If you wish to give mutual funds or bonds, please contact Erin Skinner directly for different instructions.

### 2) Instructions to your broker:

Contact your financial institution/broker and provide Securities Transfer Instructions for the Presbyterian Foundation. Note: The Presbyterian Foundation will provide you with detailed securities transfer instructions to share with your broker after they learn more about your gift as described above.

1. Once the PF Securities Donation Form is received, a member of the PF Client Service team will contact you to obtain additional information.
2. The PF will provide you with detailed securities transfer instructions to share with your broker.
3. Contact your financial institution/broker and provide securities transfer instructions for the Presbyterian Foundation.
4. Securities gifts may take up to 2 weeks to process.