

Securities Notification Form

Notify the Operations Department of the Foundation of all security transfers **prior** to transfer by faxing this Securities Notification Form to 502-805-0466, e-mailing the information to **receipts@fdn.pcusa.org**, or contacting Client Services at 800-858-6127. (Attach additional pages if required.) The original completed Securities Notification Form **must** be mailed with the gift documentation.

Donor's Name(s) _____ Date _____

Organization Name _____ Development Officer _____

Primary Address _____ Phone _____

City, state, zip _____ Gift Plan _____

Delivering Firm _____ Mutual Fund Company _____

Street Address _____ Mutual Fund Acct # _____

City, state, zip _____ Contact Name _____

Phone _____ Contact Phone _____

Additional Cash component for gift yes no Amount _____ Bond yes no

Return excess shares to donor yes no # Shares _____ Mutual Fund yes no

Common stock yes no Publicly traded yes no

Preferred stock yes no Merger buyout yes no

Existing tender offer yes no Closely held yes no

Thinly traded yes no

Assets held in a revocable trust yes no (If yes, complete Trust Revocation Notification Form) Assets held in an irrevocable trust yes no (If yes, provide Trust Documentation)

Shares	Security Description/Cusip	Cost Basis/Acquisition Date*
Example: 100	ABC Growth 123456789 ABCGX	
_____	_____	_____
_____	_____	_____

* Cost basis is assumed zero, if not provided; Acquisition is assumed long-term, if not provided.

Delivery Method DTC [Wired to Foundation Agent] Certificates [Overnight delivery to Jeffersonville preferred]
 Mutual Fund Donor's Account # _____

Securities will be transferred on or about this date _____

Gift documentation should reach the Jeffersonville office by this date _____



200 East Twelfth Street
 Jeffersonville, IN 47130
 receipts@fdn.pcusa.org

800-858-6127
 fax 502-805-0466
 www.PresbyterianFoundation.org