



Securities Gift Notification Form

Thank you for supporting Unitarian Universalism. **Before you make your gift of securities**, please complete and return this form to the UUA’s Stewardship and Development Office. The information you provide will help to ensure that the securities transfer goes as smoothly as possible and that your gift is recorded and credited correctly.

Contact Information

Donor Name(s)

Address

City State Zip

Phone Number (Home / Cell)

Email Address

UU Congregation (optional)

Gift Purpose

Please describe the purpose of your gift. (Example: “Split 50/50 between *Friends of the UUA* and X congregation,” “100% to the current UUA Campaign”, or “100% to X congregation.”)

Asset

Please describe the assets you wish to transfer to the UUA. Example: “20 shares of Microsoft stock (MSFT) approx. value \$1,000”

Note: If you hold physical stock certificates, mutual funds, or privately held securities, please contact us at giftinfo@uua.org, as the transfer may require a different process.

Transfer

The simplest and most common transfer method is an electronic transfer. Please provide contact information about those who will act as your agent in making this transfer to the UUA’s agent.

Company or Firm Name (i.e. your brokerage or investment firm)

Contact person (i.e. your broker or financial planner)

Telephone Email address

Donor Signature(s)

Name Date

Name Date

Please scan and email, mail or fax the completed form to:

Unitarian Universalist Association | 24 Farnsworth Street | Boston, MA 02210
(888) 792-5885 toll-free | (617) 725-4979 fax | giftinfo@uua.org