

# ALPHARETTA FIRST METHODIST CHURCH SECURITIES TRANSFER INFORMATION FORM

PLEASE NOTIFY THE FINANCE OFFICE SO WE CAN IDENTIFY THE DONOR:

*Alpharetta Methodist, Director of Finance*

*69 North Main Street*

*Alpharetta, GA 30009*

[hcork@amchurch.com](mailto:hcork@amchurch.com) and [giving@amchurch.com](mailto:giving@amchurch.com)

## **Donor Information**

Donor's Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

Telephone \_\_\_\_\_

## **Donor's Broker Information**

Broker/Organization Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

Telephone \_\_\_\_\_

## **Donation Information**

Date of Transfer \_\_\_\_\_

Name of Stock \_\_\_\_\_

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

Est. Value at Transfer Date \_\_\_\_\_

## **Please apply these funds as follows:**

\$ \_\_\_\_\_ Church Operating Budget

\$ \_\_\_\_\_ Debt Reduction

\$ \_\_\_\_\_ Other (Please Specify) \_\_\_\_\_

\$ \_\_\_\_\_ Other (Please Specify) \_\_\_\_\_

### **Receiving Broker Information:**

**Fidelity Investments**

**DTC# 0226**

**Account# Z20988259**

**Account Name: Alpharetta First Methodist Church, Inc.**