

Gift of Mutual Funds to Hosanna!

(THIS FORM CANNOT BE USED TO TRANSFER STOCK*)

**Donor
Information**

Owner/Co-Owner: _____
Address: _____
City/State/Zip: _____
Daytime Phone: _____

**Broker
Information**

Broker Name: _____
Address: _____
City/State/Zip: _____
Broker Phone Number: _____

**Broker
Instructions**

Please gift shares of mutual funds from my account per the following:

My Account Number: _____
Fund Name/Symbol: _____
Quantity of Shares: _____

Please transfer the shares electronically to:

Hosanna! Lutheran Church
Account Number 332-044152
Held at MorganStanley SmithBarney
8300 Norman Center Drive, Suite 1150
Bloomington, MN 55437
DTC #0015
Tax ID 41-1416314
Attn: Brian Bjorklund

Contribution to be applied to

General Fund: _____
Multiply: _____
Other: _____
(Please list)

Owner's Signature

Date

Co-Owner's Signature

Date

Medallion Guarantee

Donors may need to have the above signatures guaranteed via a medallion through a financial institution such as a bank or stockbroker. A notary public cannot provide a medallion signature guarantee.

*To donate stock use the Gift of Stock Form. Questions? Contact Stacey Peterson: 952-898-9122 or staceyp@hosannalc.org.

To ensure a successful funds transfer:

- Fax a copy of this form to Stacey Peterson at 952-435-7373 (or email a scanned copy to staceyp@hosannalc.org) to allow the church to properly identify and acknowledge your gift.
- Provide this original form to your broker.