

# GIFT OF MUTUAL FUNDS

This form CANNOT be used to transfer Stock

## 1 Donor Info

Owner/Co-Owner \_\_\_\_\_  
Address \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
Daytime Phone \_\_\_\_\_

## 2 Broker Info

Broker's Name \_\_\_\_\_  
Address \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
Phone Number \_\_\_\_\_

## 3 Broker Instructions

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

Account # \_\_\_\_\_  
Fund Name/Symbol \_\_\_\_\_  
Quantity of Shares \_\_\_\_\_

**Please transfer the shares to:**

**Willow Creek Community Church**  
**Account Number: X48-232548**  
**Held at Fidelity Brokerage Services**  
**DTC#: 0226**  
**Tax ID: 51-0164942**

## 4 Contribution to be applied to the General Fund for Willow Creek Community Church:

**General Fund:** South Barrington \_\_\_\_\_ Chicago \_\_\_\_\_ Crystal Lake \_\_\_\_\_  
North Shore \_\_\_\_\_ Huntley \_\_\_\_\_ South Lake \_\_\_\_\_ Wheaton \_\_\_\_\_

## 5 Signatures & Seal

\_\_\_\_\_  
Owner's signature & date

\_\_\_\_\_  
Co-Owner's signature & date

## 6 Donor's Final Steps: To ensure a successful funds transfer, please:

- (1) Scan ([contributions@willowcreek.org](mailto:contributions@willowcreek.org)) or fax ((847) 765-0420) this form to Willow Creek Accounting
- (2) Provide this original form to your broker

**IMPORTANT NOTE TO DONORS:** Due to privacy concerns, your name is not transmitted by the broker to Willow Creek to identify you as the donor. For Willow Creek Accounting to identify you as the donor for IRS purposes, we rely solely on you scanning ([contributions@willowcreek.org](mailto:contributions@willowcreek.org)) or faxing ((847) 765-0420) this form to us.