



P.O. Box 241227 | Montgomery, AL 36124-1227 | Phone: 334.394.2000 | Fax: 334.394.2039 | Email: [tbfa@tbfa.org](mailto:tbfa@tbfa.org) | Website: [www.tbfa.org](http://www.tbfa.org)

## **GIFTS OF PUBLICLY TRADED SECURITIES**

*Thank you for your interest in making a gift of securities to The Baptist Foundation of Alabama (“TBFA”) or through TBFA for a church or ministry. Please share these instructions with your broker to help facilitate your gift and contact TBFA with any questions.*

### **IF THE SECURITIES ARE HELD ELECTRONICALLY:**

Your bank or broker may transfer stock to TBFA’s brokerage account with the information below.

**DTC Number:** 2663  
**Brokerage** SEI Private Trust Company  
**Account Name:** Regions Bank FBO SPTC The Baptist Foundation of Alabama - Miscellaneous  
**Account Number:** 1150000431  
**Brokerage Contact #:** (205) 420-7297 (Anthony Meuth)

It is important that the bank or broker contact the TBFA in order for us to identify the transfer in a timely and accurate manner. What information is helpful? To help us correctly identify, value and receipt your gift in a timely manner, the following information from you or your broker is important. *TBFA will issue a contribution receipt following the receipt of your securities.*

- 1. Donor’s name and address**
- 2. Stock information (number of shares, name of stock and symbol)**
- 3. Originating broker**
- 4. Designation of gift, if known**

### **IF YOU HOLD THE SECURITIES IN CERTIFICATE FORM:**

Please send by first-class mail or hand deliver the *unendorsed* certificate(s), along with a letter of transmittal which includes your name, address and where you want the gift designated, to TBFA at the following address:

#### **MAILING ADDRESS:**

The Baptist Foundation of Alabama  
P.O. Box 241227  
Montgomery, AL 36124

#### **PHYSICAL ADDRESS**

*(Hand Delivery Only - DO NOT mail to this address)*  
The Baptist Foundation of Alabama  
7650 Halcyon Summit Drive  
Montgomery, AL 36117

In a separate envelope, mail to the above address or hand deliver a copy of the transmittal letter along with a *stock power executed in blank* for each stock certificate you are donating. You should sign one stock power for each stock certificate and have your signature guaranteed by a bank officer. The bank officer should **NOT** date the signature guarantee.

### **IF YOU PREFER TO HAVE YOUR CERTIFICATE RE-REGISTERED:**

The shares that you wish to donate to TBFA should be registered to “The Baptist Foundation of Alabama” The tax identification number is **63-0519158**.

### **FOR ASSISTANCE WITH A TRANSFER OR FOR MORE INFORMATION, PLEASE CONTACT:**

Paula Smith, Vice President of Trust Operations | (334) 394-2011 | Email: [psmith@tbfa.org](mailto:psmith@tbfa.org)