

Stock Gifts to the Church

Here is a process for making stock gifts to Soapstone UMC:

1. Go to United Methodist Foundation website (umfnc.org) and look under Stock Gifts for instructions and the Memorandum of Intention (MOI) form.
2. Follow the website instructions by completing the MOI form and for submitting it back to United Methodist Foundation. Under the Beneficiary section in the MOI, please indicate Soapstone UMC, Raleigh, NC. Overall, the forms and instructions are straightforward.
3. The United Methodist Foundation will send you some account information that will need to go to your broker. Contact your broker, inform them that you want to make a charitable stock gift and the broker will need to make a transfer to the United Methodist Foundation (UMF). Share with the broker the account information that you received from the UMF.
4. In parallel, please let Soapstone UMC's Financial Secretary (Katie Cable at kcable@soapstoneumc.org) aware of your intentions to make a stock gift to the church and are working with the UMF to make that happen. Please let the Financial Secretary know of your intentions to give to one of the endowment funds, to the general church fund, to a capital campaign or to any other specific area of the church, if that is the desire. Also, you may let the pastor know of your giving intentions.
5. Please ask the Soapstone UMC Financial Secretary to inform you of when your gift reaches the church from the UMF. Thank you for your blessed gift!