

Sample letter to mutual fund share custodian directing a transfer of mutual fund shares from the current owner(s) to the Presbyterian Foundation.

This instruction letter may require a medallion signature guarantee. Contact the mutual fund company or shareholder service area to determine if this is necessary. If necessary, the letter must be signed at a participating guarantor institution in front of a person authorized to guarantee the signature of the current owner(s).

Date

Mutual Fund Company Name
Mailing address

Re: Transfer of shares to new owner

Please promptly transfer the shares identified below from my/our account number _____ to the Presbyterian Church (USA) Foundation's account number _____.

Include number of shares, or specific dollar value, and fund name(s)/number(s), or identify specific shares by number and fund name, acquired on specific dates.

If transferring all shares, write "all full and partial shares" of fund name/fund #.

Thank you for your assistance. If you have any questions for the Presbyterian Church (USA) Foundation, please contact Regina Kimbrough at 1-800-858-6127, extension 5919 or contact Adminservices@presbyterianfoundation.org.

Sincerely,

Owner's Signature(s)
Owner's Address
Owner's Telephone