



## Transfer Instructions for Making a Gift of Securities to The Voice of the Martyrs

Gifts of appreciated securities are a smart and simple way to maximize the effectiveness of your charitable giving. If stocks or mutual funds\* you've held for more than a year have increased in value, you may want to consider using these assets - rather than cash - to fund your giving. By transferring ownership of your long-term stock to Voice of the Martyrs (VOM) you make a gift to support the ministry, avoid the capital gains tax you would pay if the stock were sold, and you may claim a charitable income tax deduction for the current fair market value of the asset.

\*Does not apply to tax-exempt retirement plans (e.g., IRAs, 401(k)s, etc.)

**Mutual Fund Transfers:** These transfers can be complicated. Please call VOM's Strategic Partner Services department at 1 (877) 337-0458 to find out how to transfer mutual funds.

### Stock Transfers:

- **DTC Transfer** – A convenient way to transfer securities if you hold stock in a brokerage account. Simply instruct your broker to electronically transfer your securities out of your account into VOM's Raymond James or Vanguard account and provide the appropriate account information below:

#### Raymond James

**Account:** The Voice of the Martyrs, Inc.

**DTC #:** 0725

**Account #:** 32652907

#### Vanguard

**Account:** The Voice of the Martyrs, Inc.

**DTC #:** 0062

**Account #:** 86912831

- **Certificate Transfer** - Transferring a stock certificate is easy and can be endorsed on the back of the certificate and sending it by certified mail The Voice of the Martyrs. You must sign the certificate in front of a bank officer to obtain a Medallion Signature Guarantee (notary public stamps are not an acceptable guarantor for stock certificates). Endorse the certificate exactly as your name(s) appear on the front. For example, if your certificate is listed as "Joe B. and Liz J. Smith," both parties will need to sign the certificate exactly as "Joe B. Smith" and "Liz J. Smith."

Next, write The Voice of the Martyrs **tax identification number, 73-1395057**, in the box on the back requesting a social security number or other identifying number of assignee. Mail the certificate by certified mail to:

**The Voice of the Martyrs, Inc.  
Attn: Strategic Partner Services  
1815 SE Bison Road  
Bartlesville, OK 74006**

**Employee Owned Stock in Non-Retirement Plans** – If you purchased stock from your employer (e.g. non-retirement E.S.O.P.) you can instruct them to issue a certificate in The Voice of the Martyrs name. They will need our tax identification number and our address listed above.

**Disclaimer:** This information contained in this article is not intended as a substitute for wise tax counsel. We strongly recommend you consult with a professional tax advisor before making a gift of securities.



### Securities Transfer Instruction Form

When making a gift of appreciated securities to The Voice of the Martyrs it is **important** that you contact us in advance so your gift will be properly credited when received and so we can provide you with a charitable gift receipt for tax purposes.

This form is to assist you in contacting The Voice of the Martyrs with the details of your transfer. When completed, you may mail it to us at: Voice of the Martyrs, Attn: Strategic Partner Services, PO Box 443, Bartlesville, OK 74005-0443 ; fax to (918) 338-0189; or send this information in an email to [sps@vom.org](mailto:sps@vom.org). If you have any questions or need further information, please call the Strategic Partner Services team at (877)337-0458 or (918)337-8015.

Date: \_\_\_\_\_

Donor Name(s): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Daytime Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

#### Quantity/Name/Symbol of Securities being transferred:

# of Shares \_\_\_\_\_ of \_\_\_\_\_

Stock brokerage firm: \_\_\_\_\_

Broker's name: \_\_\_\_\_ Phone #: \_\_\_\_\_

This transfer will be me as soon as possible (or on \_\_\_\_/\_\_\_\_/\_\_\_\_).

Stock will be transferred to Voice of the Martyrs account at:

Raymond James

Vanguard

VOM's contact:

Brenda Matlock, Strategic Partner Services Manager | ph. 877-337-0458 | [sps@vom.org](mailto:sps@vom.org) | fax: 918-338-0189

**Disclaimer:** This information contained in this article is not intended as a substitute for wise tax counsel. We strongly recommend you consult with a professional tax advisor before making a gift of securities.