



DONOR ADVISED FUND SECURITIES DONATION FORM

Any donation of marketable securities to Legacy Ministry Services, (Legacy), is considered a donation of securities to a public charity. The donor, therefore, may be entitled to a potential tax deduction, the value of which is based on the Middle Market Value (MMV) of the securities on the day of donation if held for more than one year. Legacy will issue a written acknowledgment to the donor reflecting this value when confirming the receipt of the securities.

On receipt of the securities, they are sold, and the proceeds deposited into the Donor Advised Fund (DAF) indicated. However, if the donor wishes Legacy to hold the securities, Stewards Advisory Services, our investment advisors, will assess if that is possible and advise the donor.

Which Donor Advised Fund will the proceeds be deposited into?

Provide details of the securities you expect to transfer			
Name		Approximate value	
Quantity		Expected date of transfer	
Name		Approximate value	
Quantity		Expected date of transfer	
Name		Approximate value	
Quantity		Expected date of transfer	
Name		Approximate value	
Quantity		Expected date of transfer	
Name		Approximate value	
Quantity		Expected date of transfer	

Declaration

By signing below, I/we:

- Acknowledge that the information provided is accurate to the best of my/our knowledge.
- Acknowledge that I/we have read and understood the above declaration.
- Acknowledge that I/we have read the original "Donor Advised Fund Agreement."

Signature _____

Signature _____

Print Name _____

Print Name _____

Date _____

Date _____

Please contact us when transferring securities so preparations can be made for their receipt and the deposit into the DAF.

If we do not receive notification of your donation and the DAF for which it is intended within 30 days of receipt, it will be assumed that these were to be an anonymous gift to Legacy Operations.

Please send completed forms to:
 Legacy Ministry Services, 2250 Chaney Rd., Dubuque, IA 52001
 info@bssmatters.com