



## Securities Transfer Form

### DONOR INFORMATION

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Name(s) \_\_\_\_\_

Cell Phone \_\_\_\_\_ Other Phone \_\_\_\_\_

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

Email(s) \_\_\_\_\_

Give Anonymously

### BROKER (if applicable)

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Business \_\_\_\_\_ Contact \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

### TRANSFER INITIATED

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Date \_\_\_\_\_

### SECURITIES TO BE DONATED

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Securities Name \_\_\_\_\_ Number of Shares \_\_\_\_\_

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Securities Name \_\_\_\_\_ Number of Shares \_\_\_\_\_

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Securities Name \_\_\_\_\_ Number of Shares \_\_\_\_\_

### DONOR INTENTION WITH STOCK TRANSFER

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Gift type, select one:

Donor Advised Fund       Charitable Remainder or Lead Trust

Charitable Gift Annuity       Outright/Direct to ministry – Purpose \_\_\_\_\_

Endowment Trust       Other \_\_\_\_\_

**POSSIBLE MINISTRY(IES) TO SUPPORT**

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**SECURITY TRANSFER INSTRUCTIONS**

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TD Ameritrade  
DTC Clearing #0188  
Baptist Foundation of Oklahoma  
Act # 427604020

Contact: Chief Investment Officer  
Phone: 405-949-9500  
Email: [cio@WatersEdgeServices.org](mailto:cio@WatersEdgeServices.org)

WatersEdge  
Tax ID Number  
EIN 73-0623038

*Note: If you are gifting stock that will not transfer to TD Ameritrade, please contact [cio@WatersEdgeServices.org](mailto:cio@WatersEdgeServices.org) for additional guidance.*

**SENDING INSTRUCTIONS**

Please email the completed Securities Transfer Form to [give@WatersEdgeServices.org](mailto:give@WatersEdgeServices.org).

Last Modified: June 15, 2021