



# GIFT OF MUTUAL FUNDS

This form cannot be used to transfer mutual funds.  
Please give this original form to your broker and a copy to PCC.

## DONOR INFORMATION

Donor Name(s): \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## INFORMATION ABOUT DONOR'S BROKER

Broker's Name: \_\_\_\_\_  
Investment Firm: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_

## GIFT INFORMATION

**Please gift shares of mutual funds from my account per the following:**

My Account Number: \_\_\_\_\_  
Name and Symbol of Fund: \_\_\_\_\_  
Quantity of Shares: \_\_\_\_\_

**To transfer, please call: John Robertson at Lion's Bridge Financial - (757) 599-9111**  
**Refer to Account:** Peninsula Community Chapel / Tax ID: 54-1392108  
Account Number: 5240-5499 / Held at LPL Financial / DTC #0075

## CONTRIBUTION TO BE APPLIED TO PENINSULA COMMUNITY CHAPEL'S:

Local Ministry Fund     Building Capital Campaign     Other \_\_\_\_\_

\_\_\_\_\_  
Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_  
Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

Donor(s) must have the above signature(s) medallion guaranteed through a bank or stockbroker. A notary public cannot provide a signature guarantee.

**Contact Information:** Peninsula Community Chapel  
4209 Big Bethel Road  
Yorktown, VA 23693  
Attention: Becki Peek - (757) 867-8530