

WAYS TO GIVE



Individuals who wish to make a gift to the Westlake United Methodist Church Permanent Endowment Fund may do so by:

Sending Cash by Check (via Mail)

Please make check payable to:

Texas Methodist Foundation
11709 Boulder Lane, #100
Austin, Texas 78726-1808

Memo: Westlake United Methodist Church,
TMF Acct#: 1934
Phone: (512) 331-9971

Sending Cash via Wire Transfer from a Bank or Brokerage Account

Wire Funds To: Frost Bank
ABA Routing Number: 114000093
Direct Deposit Account (DDA): 591802275
Account Name: Texas Methodist Foundation

For the Benefit of: Westlake United Methodist Church
TMF Acct#: 1934

Sending Cash via ACH from a Bank or Brokerage Account

Send Funds To: Frost Bank
ABA Routing Number: 114000093
Direct Deposit Account (DDA): 591802275
Account Name: Texas Methodist Foundation

For the Benefit of: Westlake United Methodist Church
TMF Acct#: 1934

Making a Gift of Stock

Step One: Instruct your brokerage firm to send the shares of stock using the following instructions:

Company Name: National Financial Services
DTC Number: 0226
Account Name: Texas Methodist Foundation
Account Number: X83-950873



Step Two: Complete and submit a "Gift of Stock" form to Texas Methodist Foundation.

**OPTIONS
CONTINUE
ON REVERSE**



MANDATORY FINAL STEP:

For all donors wishing to receive a 501(c)(3) Tax-Compliant Donation Receipt from Westlake United Methodist Church (EIN / Tax ID number: 74-1814922), you must communicate the details of your donation (type, amount, and the date on which the donation process was initiated) to:

Tim Cook | accounting@westlake-umc.org | (512) 327-1335

Recommending a Grant from Your Donor Advised Fund (DAF) Account at TMF

Step One: Contact Samantha Stanley at (512) 583-1940 or via email at sstanley@texasmethodistfoundation.org to initiate the creation of your DAF at Texas Methodist Foundation.

Step Two: Make an initial contribution in the form of cash, securities, or other assets after your DAF is created.

Step Three: Recommend a grant to support Westlake United Methodist Church
TMF Acct#: 1934

Recommending a Grant from Your DAF Account at Another Institution

Step One: Recommend a grant from your sponsor (e.g. Fidelity, Schwab, Vanguard, et al) to Texas Methodist Foundation
EIN / Tax ID Number: 74-1363741

Step Two: Inform TMF of the amount of the incoming grant, the anticipated processing date, and confirm the appropriate account number for Westlake United Methodist Church

OPTIONAL: Establish a new DAF at Texas Methodist Foundation by recommending a grant from your existing DAF. To learn more, contact Samantha Stanley at (512) 583-1940 or via email at sstanley@texasmethodistfoundation.org.

Making a Qualified Charitable Distribution (QCD) from your Individual Retirement Account (IRA)

*This option is only available to individuals 70 ½ years of age and older; maximum amount for 2026 is \$111,000 per IRA account holder per year.

Instruct the custodian of your IRA account to issue a QCD check to:
Texas Methodist Foundation
EIN/Tax ID: 74-1363741

11709 Boulder Lane, #100
Austin TX 78726

For the Benefit of: Westlake United Methodist Church
TMF Acct#: 1934

Making a Future Gift

Option One: Gift by Beneficiary Designation

Instruct your bank and/or brokerage firm to include the Westlake United Methodist Church as a beneficiary on your account(s).
EIN/Tax ID Number: 74-1814922

Option Two: Gift by Will or Living Trust

Include Westlake United Methodist Church in your newly created will or trust or via a codicil to an existing will.

Please Include:
Westlake United Methodist Church
EIN/Tax ID Number: 74-1814922
1460 Redbud Trail
Austin, TX 78746

MANDATORY FINAL STEP:

For all donors wishing to receive a 501(c)(3) Tax-Compliant Donation Receipt from Westlake United Methodist Church (EIN / Tax ID number: 74-1814922), you must communicate the details of your donation (type, amount, and the date on which the donation process was initiated) to:

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