



MOUNTAIN SKY  
UNITED METHODIST  
FOUNDATION

*Endowments  
Investing  
Gift Planning  
Loans*

**Transfer of Funds Request**

*For Internal account transfers.*

*For external transfers use the Deposit or Withdrawal form.*

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

Church/Agency or Individual Name: \_\_\_\_\_

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

**FROM** Account Number: \_\_\_\_\_ Account Name: \_\_\_\_\_

Investment type (if applicable) \_\_\_\_\_

**TO** Account Number: \_\_\_\_\_ Account Name: \_\_\_\_\_

Investment type (if applicable) \_\_\_\_\_

One-time transfer amount \$ \_\_\_\_\_ OR

Periodic transfer amount \$ \_\_\_\_\_ Monthly  or Quarterly

From:  Earnings  Principal

Reason for Transfer : \_\_\_\_\_

**NOTE: Transfers of principal from Church/Agency Endowment Accounts must include meeting minutes with this form.**

Transfer Authorized by:

(1) Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_ Phone or Email: \_\_\_\_\_

(2 if applicable) Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_ Phone or Email: \_\_\_\_\_

E-mail Address for Receipt Confirmation: \_\_\_\_\_

**NOTE: Transfer Requests from the Fixed Income, Balanced, and/or Equity Growth Fund accounts must be received by the Foundation by Noon on the last business day of the month. Transfers from these accounts are effective the first day of the following month.**

Questions: [info@MountainSkyUMF.org](mailto:info@MountainSkyUMF.org) or 303.778.6370

<b>For Internal Use Only</b>	
DDI c <input type="checkbox"/>	DDI/FW tx <input type="checkbox"/>
Phone <input type="checkbox"/>	Email <input type="checkbox"/>
Scan <input type="checkbox"/>	
Activity Log <input type="checkbox"/>	Cash Sheet <input type="checkbox"/>
Sig <input type="checkbox"/>	QB <input type="checkbox"/>
Ack <input type="checkbox"/>	

*Tithe Your Will*