



# Donor Advised Funds (DAF)

If you have a donor-advised fund with a sponsoring charity like a Christian-based fund, community foundation, the National Philanthropic Trust, or the charitable arm of one of the big brokerage firms (Fidelity, Vanguard, Schwab) you can direct the remaining balance in your DAF to support Southwestern Baptist Theological Seminary (SWBTS), rather than let it go to the sponsoring charity.

Over time, you may have made significant gifts to this fund. Upon your death, you have three options:

1. You can designate someone in your family to keep it going,
2. You can allow your funds to go to the sponsoring charity arm,
3. Or you can designate SWBTS to receive the remainder from the fund.

In this day and age, many of these large brokerage houses have little to no connection to Christian values and causes. In fact, you may not be aware that many are supportive of causes opposing traditional Christian and family values. By suggesting that you name SWBTS as the ultimate beneficiary for all or part of an existing DAF and using the change of beneficiary form, you ensure that your stewardship is carried forward in perpetuity.

This gives you a chance to designate your gift for a Christian cause like SWBTS. You can make sure the proceeds of your stewardship go to a purpose you truly support. Additionally, you'll maintain flexibility to change the beneficiary or allow other family members the ability to designate after you have passed away. And because these assets were already designated for charity, your gift will not take anything away from your heirs.

## Contact us for Assistance:

Email: [giving@swbts.edu](mailto:giving@swbts.edu)

Phone: 817-921-8830

Office of Institutional Advancement  
Southwestern Baptist Theological Seminary  
P.O. Box 22500  
Fort Worth, Texas 76122

**Complete and return SWBTS' Stock Transfer Form below**



## Southwestern Baptist Theological Seminary Gifts of Stock Transfer

Name \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number(s) Work \_\_\_\_\_ Home \_\_\_\_\_

Please Designate my gift to \_\_\_\_\_ (SWBTS, Program, Fund)

Broker Name and Brokerage Firm \_\_\_\_\_

Type of Stock (Check One):

Common  Preferred  Restricted  Publicly Traded  Non-Publicly Traded  Mutual Funds

Name of Stock \_\_\_\_\_

Number of Shares \_\_\_\_\_

The undersigned (Donor) authorizes the transfer of this stock to Southwestern Baptist Theological Seminary

Signature \_\_\_\_\_

1. Complete the Form
2. Print three copies
3. Sign each copy on the signature line.

Keep one copy for your records, send one copy to your broker, and send one copy to:

Southwestern Baptist Theological Seminary  
Office of Institutional Advancement  
Southwestern Baptist Theological Seminary  
P.O. Box 22500  
Fort Worth, Texas 76122  
giving@swbts.edu

### **STOCK GIFTS:**

For ELECTRONIC, DIRECT TRANSFER of Stock:

National Financial Services Corporation

For ACCOUNT # H9H-006947

DTC # 226

NSSC # 226