

Instructions

This form is to notify The Signatry of your intention to gift publicly traded securities and to provide us with tracking information. It does not initiate the gift. Use the instructions below to notify your broker of your desire to contribute publicly traded securities to a fund at The Signatry.

Step 1: Fill out the information on the following page and return the form to The Signatry.

Mail or Overnight Delivery:

The Signatry
7171 W. 95th Street, Suite 501
Overland Park, KS 66212

Fax:

913-227-0254

Email:

donorcare@thesignatry.com

Step 2: Contact your broker to initiate the transfer.

Please give the below information to your broker:

Deliver all DTC/ACT eligible securities to:

Charles Schwab and Company
DTC 0164, Code 40
Account name: The Signatry
Account number: 1133-5399

Other Securities:

If unable to deliver via DTC/ACT, please contact a member of our Donor Care team at 913-310-0279 or donorcare@thesignatry.com.

Note: The financial institution holding the security may require the use of its own form or letter of instruction. Please check with the firm to see what additional forms they require. If the funds are not transferable, notify The Signatry that the gift has been withdrawn.

All stock donated to the above account will be liquidated and the cash from the sale proceeds will be transferred to the fund. If you would like to request the stock donation should not be immediately liquidated (sold), contact The Signatry Donor Care for alternative transfer instructions.

Fund Information

This gift is intended to be given as an irrevocable donation to The Signatry and placed in the following fund:

Fund Name

Fund ID

All stock donated to the above account will be liquidated and the cash from the sale proceeds will be transferred to the fund. If you would like to request the stock donation should not be immediately liquidated (sold), contact The Signatry Donor Care for alternative transfer instructions.

Source of Contribution

Please complete the following details regarding your contribution:

Contributor's Name

Address

Street

City

State

Zip

Phone

Email Address

Name of Transferring Security Issuer

Expected Date of Transfer

List of Marketable Securities

Please complete the following information regarding your contribution so that we can identify your gift when it is transferred to The Signatry.

If you are transferring more than 3 securities, please attach a spreadsheet with the full list of securities.

1.	Name of Security	# of Shares
	Ticker/CUSIP	Expected Value (\$)
2.	Name of Security	# of Shares
	Ticker/CUSIP	Expected Value (\$)
3.	Name of Security	# of Shares
	Ticker/CUSIP	Expected Value (\$)

If you wish to contribute an asset other than cash or publicly traded securities, please contact The Signatry to discuss the review process.

Fund Information

This gift is intended to be given as an irrevocable donation to The Signatry and placed in the following fund:

Fund Name _____

Fund ID _____

Acknowledgment

I understand and acknowledge that this form cannot be used to transfer property to The Signatry. Any contribution should be coordinated with my broker or advisor, and any contribution, once accepted by the fund, represents an irrevocable contribution to The Signatry and is not refundable to me for any reason.

Contributor's Signature _____

Date _____

Funds held at The Signatry are property of The Signatry and are subject to The Signatry's exclusive legal control. Grant funds can only be used for charitable purposes and may not be used to benefit the donor, the donor advisor, nor any other purpose conferring an impermissible private benefit.