

## Instructions

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Please use the below form to gift publicly traded securities (stocks or mutual funds) to a donor advised fund with The Signatry. You may also notify us of your expected transfer by logging in to your account at [thesignatry.com](https://thesignatry.com).

**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](mailto:donorcare@thesignatry.com)

Note: This form is for The Signatry's internal tracking only. This form ensures that The Signatry can internally track your shares once they have been gifted. You must still initiate the gift through your broker.

**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](mailto: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, please contact The Signatry.

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

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## Donor Advised Fund Information

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

Donor Advised/Designated Fund Name

Fund Number

All stock donated to the above account will be liquidated and the cash from the sale proceeds will be transferred to the donor advised fund. If 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 transfer:

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 transfer so that we can identify your gift when it is transferred to The Signatry.

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.

## Acknowledgment

I understand that 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