

**INSTRUCTIONS FOR GIFTING SECURITIES**

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](http://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:**

[info@thesignatry.com](mailto:info@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 [info@thesignatry.com](mailto:info@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 transferrable, please contact The Signatry.)

**STOCK & MUTUAL FUND CONTRIBUTION FORM**

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

Donor Advised/Designated Fund name	
Fund number	

**Source of Contribution**

Please provide the following information for the person(s) making this contribution. If the fund holder is the contributor, only the name of the fund holder is required (in addition to any information that has changed since the submission of the Fund Application).

Contributor's name	
Street address	
City/State/Zip	
Phone	
Email address	
Name of Security Issuer	
Expected date of transfer	

**List of Marketable Securities**

Please complete the following information regarding your transfer so that we can recognize 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 (\$)	

Note for other Assets: 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	
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