

Instructions

Please use the below form to gift publicly traded securities (stocks or mutual funds) to a donor advised fund with The Signatry.

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

Email:

investments@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:

TD Ameritrade

DTC 0188

Account Name: The Signatry

Account Number: 949103086

Other Securities:

If unable to deliver via DTC/ACT, please contact Elizabeth Bickley at 913-553-2204 or

investments@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.

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

Source of Contribution

Please complete the following details regarding your transfer.

If the transfer is coming from an account owned by a trust, please provide the full legal name of the trust in the Contributor Name.

Contributor's Name

Address

Street

City

State

Zip

Phone

Email Address

Name of Transferring Security Issuer

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.

If you are transferring more than 3 securities, please attach an excel 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.

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