

Contribution Notification FORM



This form is to notify The Signatry of your intention to make a gift and to provide us with tracking information. It does not initiate the gift. Without the information on this form, we may not be able to place your contribution in the intended fund when we receive it.

HOW TO USE THIS FORM

1. Complete the fund and contributor information (sections A and B)
2. Choose the method of contribution (section C) and complete the related information (either section D or E)
3. Sign (section F) and submit a completed copy of this form to The Signatry via email to donorcare@thesignatry.com or via fax to 913-227-0254
4. Instruct your advisor/broker to initiate the gift.

REQUIRED INFORMATION

A

Fund Information

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

Fund Name

Fund ID

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.

If the fund is an Advisor Managed Account, choose one Receiving Account:

- ☐ **The Signatry's main account**
Securities received into The Signatry's main account will be liquidated upon receipt.
- ☐ **The Signatry's Advisor Managed Account** ending in ____

B**Contributor**

Please provide the following information for the person(s) making this contribution.

Contributor's Name

Address

Street

City

State

ZIP

Phone

Email Address

C**METHOD OF CONTRIBUTION**

This form is notification for a contribution of (select one of the following):

- ☐ **Cash**
Complete section D below
- ☐ **Securities** (Note: Cannot be held at a third-party transfer agent such as Computershare, EQ Shareowners, etc.)
Complete section E below

D**Cash Donations**

Amount of Donation

Expected Date of Transfer

Name of Sending Institution

If transferring via Wire or ACH:

Please include the fund ID and/or name in the comments section of the wire transfer. This will help us identify the intended destination for the contribution in a timely way.

U.S. TRANSFERS

Receiving Bank:
National Bank of Indianapolis
107 N. Pennsylvania St., Suite 700
Indianapolis, IN 46204

Receiving Bank ABA: 074006674
Beneficiary Name: The Signatry
Beneficiary Account Number: 1643188

INTERNATIONAL TRANSFERS

Receiving Bank:
First Horizon Bank
165 Madison Ave
Memphis, TN 38103

SWIFT Code: FTBMUS44
Receiving Bank ABA: 084000026
Beneficiary Name: The Signatry
Beneficiary Account Number: 1643188

Securities Donations

Instruct your advisor/broker to initiate the gift.

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 (\$)

For securities being transferred to The Signatry's main account, contact your broker to initiate the transfer with the information below. **Securities received in The Signatry's main account will be liquidated on receipt.**

Deliver all DTC/ACT eligible securities to:

Charles Schwab and Company

DTC 0164, Code 40

Account name: The Signatry

Account number: 9511-3100

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 securities 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 securities are not transferable, notify The Signatry that the intended gift will not be completed.

Finalize and Submit Contribution Form

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.

Donor's Signature _____

Date _____

Form Submission Checklist

- ☐ Complete the fund and contributor information (sections A and B)
- ☐ Chose the method of contribution (section C) and complete the related information in either section D or E
- ☐ Sign (section F) and submit a completed copy of this form to The Signatry via email to donorcare@thesignatry.com or via fax to 913-227-0254
- ☐ Instruct your advisor/broker to initiate the gift.

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