

# **Instructions and Transfer Form for Giving Stock and Mutual Funds**

Please use the below form to gift publicly traded securities (stocks or mutual funds) or real estate to an **Stronger Co.** donor-advised fund with The Signatry, a Global Christian Foundation. You may also notify us of your expected transfer by logging in to your account at the signatry.com.

#### Step 1:

Fill out the information on the following page and return the form to **Stronger Co.** & **The Signatry.** 

## **Mail or Overnight Delivery:**

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

Email: donorcare@thesignatry.com

**Fax:** 913-227-0254

<u>Note:</u> 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. Instructions Page 1 / 2

<u>Note:</u> 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.

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.

## STRONGER CO. STOCK Transfer Form

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm. I understand that I must initiate this transfer with my broker. My intention is to gift these stocks (or other assets) to Stronger Co. through The Signatry, a global Christian Foundation. If you have any questions or if there is a problem with this transfer please contact Christine York, with The Signatry at <a href="mailto:donorcare@thesignatry.com">donorcare@thesignatry.com</a>.

**IMPORTANT:** Please send one copy to your investment advisor, one copy to The Signatry, and one copy to **Carly Webber** at <u>carly@strongerco.org</u>

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Banking/Brokerage Information				
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he Signatry Giving Fund Name: Stronger Co. Single Charity Fund				#2516690
ronger Co. is a 501(c)(3) nonprofit organization. Federal Tax Identification Number				#85-4045189
Description of Assets/Name of Security	Symbol	Exact # of Shares*	** A	pprox. \$ Value
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