

Form A
Gifts of Stock Held in a Brokerage or Bank Account

Listed below is the information needed to make your stock transfer. When the gift is held by a stockbroker or bank, contact them with instructions to make the stock transfer into the UnityPoint Health Foundation – Des Moines account. Your broker may ask for the information below to start the transfer process. Upon receipt of your stock, we will send an acknowledgment letter to you documenting the date of transfer and a description of the stock given.

According to IRS guidelines, the date and value of your gift are determined by the date on which UnityPoint Health Foundation –Des Moines takes control of your securities.

TO _____
Name of your stockbroker and their company name.

DATE: _____

FROM _____
Donors Name (s) Account number

Please transfer immediately, _____ shares of _____ from the above account to the UnityPoint Health Foundation - Des Moines account at SEI formatted as follows:

SEI Private Trust Company; Depository Trust Company (DTC) # 2039
Institution Number/ID Agent Number: 94952
Agent Internal Account Number: 11102-C
Interested Party #1: UnityPoint Health FDN (Gift)
Gift Account Number: 17182F-UPHFG

Brokers questions or problems please contact:
SEI, Cat Von Alst at 610-676-2683 or CVonAlst@seic.com

If you would like your gift designated, please indicate your intent below.

Donor signature

Second signature if required

The Federal Tax Identification Number for UnityPoint Health Foundation - Des Moines is 42-1467682. We would like to quickly and accurately acknowledge your gift. If you have not already discussed details of your stock transfer with someone at the UnityPoint Health Foundation – Des Moines please contact Don Ireland-Schunicht or Dan LaGrange, or send us a completed copy of this form.

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