UNBOUND

How to transfer shares of stock to Unbound

Stock shares may be transferred to Unbound by electronic wire or physical transfer. Because of security concerns and the complexities of physical transfer, we prefer transfers via electronic wire.

Included below are transfer instructions to our trust account with Bank of Kansas City. Please notify us with the name of your financial institution, the number of shares or estimated stock value, issuing company and how you would like us to utilize the funds. This will help us to identify your gift when it is received by our bank and to disburse the funds according to you wishes.

Electronic stock transfers:

To initiate a transfer, please notify your broker or financial institution that you wish to make a donation of stock or marketable securities to Unbound. The transfer will be made electronically via DTC to our account with Bank of Kansas City. Please note that Bank of Kansas City is an affiliate of Bank of Oklahoma. Your financial institution will require the following information:

Bank of Kansas City
c/o Mr. Cody Bezanson
7500 College Blvd, Suite 1450
Overland Park, Kansas 66210
Tel: Direct (913) 307-1659 / E-mail: cbezanson@bokf.com

Transfer instructions are as follows:

To DTC no. 0901 (Bank of New York)
For the benefit of no. 016071 (Bank of Oklahoma)
Further credit to account no. 71-9968-03-4 (Unbound)

Please contact us regarding your pending stock donation.

Physical transfers of stock:

Please contact us for specific instructions regarding stock donations and physical transfers of stock certificates. Stock Power forms with specific instructions for transfers to Unbound are available upon request. For security purposes, stock certificates and Stock Power forms should always be sent by certified mail in separate envelopes to the fooling address.

Office of Gift Planning
Unbound
1 Elmwood Avenue
Kansas City, Kansas 66103

Transfers of privately held stock:

You may also wish to donate shares of privately held stock which will also require the physical of stock certificates to Unbound. If the value of the privately held stock is more than $10,000, a qualified appraisal is required. In addition, with gifts of privately held stock, there may be a discount for minority interest or lack of marketability. Your appraiser should determine the discount (if any apply) and value of the stock.

This document provides general information about gift planning and is not intended to provide individual financial, legal or tax information or advice. Unbound recommends that you speak with a tax adviser, financial adviser or attorney about how to make charitable giving part of your overall financial plan.