



How to transfer mutual fund shares to Unbound

Mutual fund shares may be transferred to Unbound by electronic wire. However, mutual fund companies have their own guidelines for transferring shares of their funds. We prefer that your donation be transferred directly to our trust account with Bank of Kansas City.

Included below are transfer instructions to our trust account with BOK Financial. For donations of stock and mutual funds, 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 identify your gift when it is received by our bank's trust department and allow us to disburse the funds according to your wishes. These instructions are for electronic transfers only. Please contact me directly for gifts of physical securities.

To initiate a transfer, please notify your broker or financial institution that you wish to make a donation of mutual funds to Unbound. The transfer will be made electronically via DTC to our account with BOK Financial. Your financial institution will require the following information:

BOK Financial
c/o Lisa A. Moberly
7500 College Blvd, Suite 650
Overland Park, Kansas 66210
913-234-6648 | Phone
913-234-6640 | Fax
lmoberly@bokf.com | Email

Mutual Fund transfer instructions:

Fund Name	Fund #	CUSIP/Ticker	'To' Fund Acct#	Registration	TID

1. Broker completes: FUND NAME, FUND No., CUSIP/TICKER
2. Broker sends BOK Financial Securities the fund information before initiating the transfer. Please contact Lisa Moberly at (913) 234-6648 or lmoberly@bokf.com
3. Once BOKF provides confirmation to the sending party, then the transfer can be transmitted to BOKF.

Unbound is a 501(c) (3) non-profit organization located at 1 Elmwood Avenue, Kansas City, KS 66103. Our federal tax identification number is 43-1243999. If I can be of further assistance, please feel free to call me at (800) 875-6564, ext.7146, or (913) 384-7146.

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.