



## **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 electronic transfers.

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 your 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 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](mailto:lmoberly@bokf.com) | Email

 <b>FREE DELIVERY INSTRUCTIONS</b> Please send <b>CUSIP</b> and <b>Donor Name</b> with any security transfer	
<b>DTC</b>	<b><u>We accept whole shares only. Please liquidate fractional shares</u></b> DTC Clearing Account No: 0443 Pershing, LLC FBO: Unbound Donor <b>TNC012142</b>

**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 following 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 transfer 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 prior to transfer.

*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.*