

## 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 Iowa Health Foundation d/b/a/ UnityPoint Health – Des Moines Foundation 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 – Des Moines Foundation takes control of your securities.

TO: \_\_\_\_\_  
Name of your stockbroker and their company name

DATE: \_\_\_\_\_

FROM: \_\_\_\_\_  
Donor Name(s) Account number

Please transfer immediately, \_\_\_\_\_ shares of \_\_\_\_\_ from the above account to the UnityPoint Health – Des Moines Foundation 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**

**Broker 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 donor signature if required

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

UnityPoint Health – Des Moines Foundation  
1415 Woodland Ave, E-200  
Des Moines, Iowa 50309

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