



ALIYAH FOUNDATION

Instructions and Transfer Form for Giving Stock and Mutual Funds

Please use the below form to gift publicly traded securities (stocks or mutual funds) or real estate to an **Aliyah Foundation** donor-advised fund with The Signatry, a Global Christian Foundation. You may also notify us of your expected transfer by logging in to your account at thesignatry.com.

Step 1:

Fill out the information on the following page and return the form to **Aliyah Foundation & The Signatry**.

Mail or Overnight Delivery:

The Signatry
7171 W. 95th Street
Suite 501
Overland Park, KS 66212
Email: donorcare@thesignatry.com
Fax: 913-227-0254

Note: This form is for The Signatry's internal tracking only. This form ensures that The Signatry can internally track your shares once they have been gifted. You must still initiate the gift through your broker.

Step 2:

Contact your broker to initiate the transfer. Please give the below information to your broker:

Deliver all DTC/ACT eligible securities to:

Charles Schwab and Company
DTC 0164, Code 40
Account name: The Signatry, Account number: 1133-5399

Other Securities: If unable to deliver via DTC/ACT, please contact a member of our donor care team at 913-310-0279 or donorcare@thesignatry.com. Instructions Page 1 / 2

Note: The financial institution holding the security may require the use of its own form or letter of instruction. Please check with the firm to see what additional forms they require. If the funds are not transferable, please contact The Signatry.

All stock donated to the above account will be liquidated and the cash from the sale proceeds will be transferred to the donor advised fund. If the stock donation should not be immediately liquidated (sold), contact The Signatry Donor Care for alternative transfer instructions.

ALIYAH FOUNDATION STOCK Transfer Form

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm. I understand that I must initiate this transfer with my broker. My intention is to gift these stocks (or other assets) to **Aliyah Foundation** through **The Signatry**, a global Christian Foundation. **If you have any questions or if there is a problem with this transfer please contact Kim Harris, with The Signatry at kharris@thesignatry.com.**

IMPORTANT: Please send one copy to your investment advisor, one copy to The Signatry, and one copy to **Paul Klassen at paul@aliyahfoundation.org** or **Danya Jordan at danya@aliyahfoundation.org**.

Donor Information

Name: _____

Address: _____
 Street City State Zip

Email: _____

Phone: _____

Banking/Brokerage Information

Donor Bank/Brokerage Firm Name: _____

Contact Person: _____ Phone: _____

Anticipated Date of Transfer: _____

The Signatry Giving Fund Name: Aliyah Foundation Single Charity Fund #167614

Aliyah Foundation is a 501(c)(3) nonprofit organization. Federal Tax Identification Number #83-0581033

Aliyah Foundation Contact: Danya Jordan, Donor Development Specialist

Email: paul@aliyahfoundation.org | danya@aliyahfoundation.org

Please irrevocably transfer stocks, mutual funds, or other publicly traded assets listed below:

Description of Assets/Name of Security	Symbol	Exact # of Shares***	Approx. \$ Value

*** Please initiate the transfer based on the number of shares and not the dollar value since security values may fluctuate. Shares are to be transferred in kind and not to be liquidated.***

This is my written authorization to irrevocably transfer ownership of the assets specified in this form to **The Signatry**. I understand that any contribution, once accepted by the Fund, represents an irrevocable contribution to **Aliyah Foundation** through **The Signatry** and is not refundable to me for any reason.

Gift Designation: _____ **Greatest Need:** _____

 Donors(s) Authorized Signature Date