



UnityPoint Health  
St. Luke's Foundation

## *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 St. Luke's Health Care Foundation **d/b/a/ St. Luke's 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 St. Luke's Health Care Foundation takes control of your securities.

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

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

FROM \_\_\_\_\_  
Donors Name (s) Account number

Please transfer immediately, \_\_\_\_\_ shares of \_\_\_\_\_ from the above account to the St. Luke's Health Care 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: St. Luke's HealthCare Foundation**  
**Gift Account Number: 17182F-CRG**

**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 signature if required

The Federal Tax Identification Number for St. Luke's Health Care Foundation **d/b/a/ St. Luke's Foundation** is 42-1106819. We would like to quickly and accurately acknowledge your gift. If you have not already discussed details of your stock transfer please contact Mary Klinger or Dan LaGrange or send us a completed copy of this form.

St. Luke's Health Care Foundation  
810 1<sup>st</sup> Ave NE, 2<sup>nd</sup> Floor  
Cedar Rapids, Iowa 52402

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