UnityPoint Health
St. Luke's Health Care 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 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: _____ **Account Number:** _____

From: _____
Donor Name(s)

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 Health Care 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 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 Melissa Winter, President, UnityPoint Health – St. Luke's Health Care Foundation or send us a completed copy of this form.

St. Luke's Health Care Foundation
810 First Ave NE, 2nd Floor
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phone: 319-866-1832
email: melissa.winter@unitypoint.org