

Notice of Intent to Transfer Stock

To ensure your gift is processed accurately, please inform Union Bank & Trust by completing and returning this form before the transfer is made.

Donor Information: (Leave blank if donor wishes to remain anonymous)

Donor Name(s):

Donor Street Address:

Donor City/State/Zip:

Donor Telephone:

Beneficiary Information:

Beneficiary Name(s):

Beneficiary Street Address:

Beneficiary City/State/Zip:

Beneficiary Telephone:

Gift Information:

Security Name:

Exact # of Shares:

Security Symbol:

Transferring Broker Information:

Broker Contact:

Broker Telephone:

Broker E-mail:

Date of Transfer:

Disbursement of Proceeds (Choose one)

Mail check to name/address in above beneficiary section

Deposit funds into the below Union Bank account

Account Type: Checking Savings

Account Name:

Account Number:

(All shares will be redeemed immediately once received and proceeds will be disbursed upon settlement) Send completed form to: gifting@ubt.com and priscilla@thrive-global.org
For further questions, please call: 402-323-1533

Union Bank & Trust Delivery Instructions

DTC Eligible Securities

DTC # 2067

Agent Bank # 59527

Institution # 59527

FFC: Account # 9982 / (Beneficiary Name) / (Donor Name)