

Instruction Form—Delivery of Equity Securities to Wespath

Part 1 – Identifying Information

Please complete this form when making a deposit via security transfer. This form will be used to indicate to which account(s) you would like your deposit applied.

Send completed form to the Wespath Team via

- E-mail to **investmentinfo@wespath.org**

Organization name

Organization contact name

Phone

Date

E-mail address

Part 2 – Security Information

Security name

Number of shares

Symbol/Ticker/Cusip

Part 3 – Security Delivering Institution Information

Security delivering institution name

Contact name

Phone

E-mail address

Donor name

Donation recipient

Part 4 – Wespath Security Transfer Instructions

Please provide the information on this form at least three business days before the expected date of the transfer.

Anticipated date of delivery

Please instruct your financial institution to transfer securities to:

Notes/Additional instructions

DTC# 0443

Pershing, LLC

For credit to account #: N7M002242

Client account name: Wespath Funds Trust

Funds received by 3:00 p.m., Central time are processed on that business day when U.S. financial markets are open;
funds received after 3:00 p.m., Central time are processed on the following business day when U.S. financial markets are open.



Instruction Form—Delivery of Equity Securities to Wespath (continued)

Part 5 – Deposit Instructions

Total amount of deposit _____

Indicate the account(s) to which funds should be deposited:

☐	_____	_____	_____	_____%
	Account name	Account number	Fund	Percent
☐	_____	_____	_____	_____%
	Account name	Account number	Fund	Percent

If you would like to deposit the proceeds into more than two accounts, contact Wespath at **investmentinfo@wespath.org**.