



# CALEB GLOBAL

## Instructions and Transfer Form for Giving Stock, Real Estate, and Mutual Funds

Please use the below form to gift publicly traded securities (stocks or mutual funds) or real estate to an **Caleb Global** 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](http://thesignatry.com).

### **Step 1:**

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

### **Mail or Overnight Delivery:**

The Signatry  
7171 W. 95th Street  
Suite 501  
Overland Park, KS 66212  
**Email:** [donorcare@thesignatry.com](mailto: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](mailto: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.

## Caleb Global 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 **Caleb Global** 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](mailto:kharris@thesignatry.com).**

**IMPORTANT:** Please send one copy to your investment advisor, one copy to The Signatry, and **Danya Jordan, Donor Development Specialist, at [danya@caleb.global](mailto:danya@caleb.global)**

### 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: Caleb Global Single Charity Fund #169988**

**Caleb Global is a 501(c)(3) nonprofit organization. Federal Tax Identification Number #62-1634874**

**Caleb Global Contact:** Danya Jordan, Donor Development Specialist

**Email:** [danya@caleb.global](mailto:danya@caleb.global)

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 **Caleb Global** through **The Signatry** and is not refundable to me for any reason.

**Gift Designation:** \_\_\_\_\_ **Greatest Need:** \_\_\_\_\_

\_\_\_\_\_  
Donors(s) Authorized Signature Date