


**How to transfer shares of stocks & mutual funds to Unbound**

To initiate a transfer, please notify your broker or financial institution that you wish to make a donation of stock or mutual funds to Unbound. The transfer will be made electronically via DTC to our account with BOK Financial. Please contact Unbound directly for gifts of physical securities.

Your financial institution will require the following information:

BOK Financial  
**Zach Mills**  
 Client Service Specialist, Institutional Investments  
 BOK Financial Securities, Inc.  
 Bank of Oklahoma Tower, SE Plaza  
 Tulsa, OK 74192  
 918-619-0848 | Office  
 918-639-3393 | Cell  
[zach.mills@bokf.com](mailto:zach.mills@bokf.com) | Email

**Stock transfer instructions:**

 <b>FREE DELIVERY INSTRUCTIONS</b> Please send <b>CUSIP</b> and <b>Donor Name</b> with any security transfer	
<b>DTC</b>	<u>We accept whole shares only. Please liquidate fractional shares</u> DTC Clearing Account No: 0443 Pershing, LLC FBO: Unbound Donor <b>TNC012142</b>

**Mutual Fund transfer instructions:**

FBO: **TNC012142 Unbound Donor**

FUND NAME	FUND #	CUSIP/ TICKER	'TO' FUND #	ACCT	REGISTRATION

## **Mutual Fund transfer instructions – cont'd:**

1. Broker completes: FUND NAME, FUND No., CUSIP/TICKER
2. Broker sends BOK Financial Securities the fund information before initiating the transfer. Please contact Zach Mills at (918) 619-0848 or [zach.mills@bokf.com](mailto:zach.mills@bokf.com)
3. Once BOKF provides confirmation to the sending party, then the transfer can be transmitted to BOKF.

## **Physical transfers of stock:**

We request that you contact us for specific instructions regarding stock donations and physical transfers of stock certificates. Stock Power forms with specific instructions for transfers to Unbound are available upon request. For security purposes, stock certificates and Stock Power forms should be sent by certified mail in 2 separate envelopes to the following address.

Office of Planned Giving  
Unbound 1 Elmwood Avenue  
Kansas City, Kansas 66103

## **Transfers of privately held stock:**

You may also wish to donate shares of privately held stock which will also require the physical transfer of stock certificates to Unbound. If the value of the privately held stock is more than \$10,000, the IRS requires a qualified appraisal. In addition, with gifts of privately held stock, there may be a discount for minority interest or lack of marketability. Your appraiser should determine the discount (if any apply) and value of the stock prior to transfer.

*Unbound is a 501(c) (3) non-profit organization located at 1 Elmwood Avenue, Kansas City, KS 66103. Our federal tax identification number is 43-1243999. For further information or assistance, please contact Michael Calabria at (800) 875-6564, ext.7146, or (913) 384-7146.*

*This document provides general information about gift planning and is not intended to provide individual financial, legal or tax information or advice. Unbound recommends that you speak*

*with a tax adviser, financial adviser or attorney about how to make charitable giving part of your overall financial plan.*