

**GIFT OF STOCK**

To ensure your gift is processed accurately, please inform Union Bank & Trust by completing and returning this form to Sue Herman (contact information on back) **before** the transfer is made.

**NOTICE OF INTENT TO TRANSFER STOCK**

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

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_  
Street

\_\_\_\_\_ City State Zip

Telephone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

**Beneficiary Information**

Beneficiary Name: \_\_\_\_\_

Address: \_\_\_\_\_  
Street

\_\_\_\_\_ City State Zip

Telephone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

**Gift Information**

Security Name: \_\_\_\_\_ Symbol: \_\_\_\_\_

Exact # of shares: \_\_\_\_\_

**Transferring Broker Information**

Broker/Contact: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Date of Transfer: \_\_\_\_\_

All shares will be redeemed immediately once received and proceeds will be disbursed upon settlement

**Disbursement of Proceeds** (choose one)

**Option 1:**

Mail check to name/address in above beneficiary section

**Option 2:**

Deposit funds into the below Union Bank account

Account type: Checking Savings

Account Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Once this form has been provided to Union Bank & Trust, please use the following delivery instructions for transfer

(OVER)

**Return completed form to Sue Herman @ Union Bank via...**

- A) Email: sue.herman@ubt.com or steve.fielder@ubt.com
- B) Fax: 402-323-1105 Attn: Sue Herman
- C) Mail: Union Bank & Trust  
Attn: Sue Herman  
6801 S. 27th St  
P.O. Box 82535  
Lincoln, NE 68512
- D) Phone: 402-323-1533

**Union Bank & Trust's Delivery Instructions**

**DTC Eligible Securities**

DTC #2067

Agent Bank #59527

Institution #59527

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

*(Include any special instructions here)*

**(For Internal Use Only)**

Date shares received: \_\_\_\_\_

Date shares sold: \_\_\_\_\_

Sale Price: \_\_\_\_\_

Amount of proceeds: \$ \_\_\_\_\_