

## Wespath Securities Transfer Form Instructions

- Part 2 -The security name, number of shares and cusip if available.
- Part 3 - The name of the Brokerage company or Financial Institution initiating the transfer if applicable. A contact name/email address is helpful in case of any questions.
- Part 4 - The name and address of the Church or ministry receiving the gift should be added to the Notes/Additional Instructions. An anticipated date of delivery is helpful but not necessary.
- Part 5 - This is the MN Foundation's account with Wespath. The stocks will settle into this account and we are notified by Wespath on the same day the stock is received. We then send a check for the amount of the transfer to the address on Part 4 of the form.

Send a copy of the completed form to [diane.weller@dkmmmf.org](mailto:diane.weller@dkmmmf.org) so I'm able to inform our Wespath investment manager of the transfer

Please contact me if you have any questions. Thank you supporting the ministries of your church.

### **Diane Weller**

Church Relations Director

612-230-3337 (w)

605-770-0774 (c)