



Donor Letter of Stock Transfer

The Sisters of Charity, BVM provides this form letter to assist the donor in instructing his/her broker to transfer securities as a donation to the Sisters of Charity, BVM. To assure that the donor receives proper credit for his/her gift, ***the donor will provide the Sisters of Charity, BVM with a copy of this letter by mail or fax, including the name and telephone number of donor's broker.***

Mail copy to: Andy Schroeder
Director of Development
Sisters of Charity, BVM
1100 Carmel Drive
Dubuque, Iowa 52003-7991

Fax copy to: Andy Schroeder
Fax: 563-588-4832
Telephone: 563-585-2854
email: aschroeder@bvmcong.org

To: _____
Brokerage: _____
Broker Phone Number: _____ Broker Fax Number: _____
Address: _____
City, State and Zip Code: _____

Re: Account Number: _____
Security Name: _____
Number of Shares: _____ Estimated value at \$ _____

I (we) desire that our pledge be treated as an anonymous commitment

Please accept this letter as your authorization to deliver the securities from my account, referenced above, to the account of the Sisters of Charity, BVM, per the following instructions:

Stocks & Municipal Bonds

DTC Eligible Issues:

Account Name and A/C Number: **Sisters of Charity, BVM Investment Fund 5069505**

Tax Identification Number: **42-0680320**

Receiving Firm: **SPTC FBO Heartland Financial USA**

DTC Number: **2663**

Agent Internal A/C: **20053-C**

Clearing Firm: **SEI Private Trust Company**

Please notify Michele Smith at Dubuque Bank & Trust Co. (563-589-2082 or by email at msmith@dubuquebank.com) two business days prior to sending any securities.

Grantor signature Grantor signature

Address Telephone Area Code & Number

City State Zip Code