

Instruction Form—Delivery of Equity Securities to Wespath

Part 1 – Identifying Information

Please complete this form when making a deposit via security transfer. This form will be used to indicate to which account(s) you would like your deposit applied.

Send completed form to the Wespath Team and the UMFWO Team via:

- Email to investmentinfo@wespath.org
- Email to mdewitt@wocumc.org

Organization name: United Methodist Foundation of West Ohio – UMFWO Stock Gift Account 06

Organization contact name: Maddy DeWitt

Phone: 380-223-9339

Date

E-mail address: mdewitt@wocumc.org

Part 2 – Security Information

Security name

Number of shares

Symbol/Ticker/Cusip

Part 3 – Security Delivering Institution Information

Security delivering institution name

Contact name

Phone

E-mail address

Part 4 – Wespath Security Transfer Instructions

Please provide the information on this form at least three business days before the expected date of the transfer.

Anticipated date of delivery

Please instruct your financial institution to transfer securities to:

Intended Beneficiary

DTC# 0443

Donor Name

Pershing, LLC

Donor Email

For credit to account #: N7M002242

Donor Mailing Address

Client account name: Wespath Funds Trust

Funds received by 3:00 p.m., Central time are processed on that business day when U.S. financial markets are open; funds received after 3:00 p.m., Central time are processed on the following business day when U.S. financial markets are open.

