**Gift Transfer Form**

**Thank you for your interest in supporting Liberty Hospital Foundation!** Your gift is more important than ever to ensure our community has access to health and healing. To initiate a stock or mutual funds transfer, please use the form below. Once you have initiated a transfer, please let us know by **email to** [**Emily.Morgan@libertyhospital.org**](mailto:Emily.Morgan@libertyhospital.org). We will let you know when we receive the donation. You will receive a tax receipt and confirmation of your donation.

**Liberty Hospital Foundation information:**

Address: 2525 Glenn Hendren Dr., Liberty, MO 64068

Financial Institution ACAT and DTC#: 2450

Financial Institution: UMB Bank, n.a.

Account Name: Liberty Hospital Foundation

Account Number (stock): 100266.1

*For a gift of mutual funds, please request your financial institution contact the following individuals at UMB Bank and provide the name of the security, number of shares, and the ticker symbol or cusip number of the security you are gifting. They will provide delivery instructions to your institution.*

**Brande Anderson, CTFA**

VP/Relationship Manager, Institutional Investment Management

(816) 860-1509 Office

[Brande.Anderson@umb.com](mailto:Brande.Anderson@umb.com)

**Paul Krebs**

AVP/Custody Advisor, Private Wealth Management

(816) 860-3672 Office

[Paul.Krebs@umb.com](mailto:Paul.Krebs@umb.com)

**Your information**

Donor Name(s):

Donor Email:

Donor Home Address:

Donor Phone:

Can we disclose the donor information?

Is the total value of this gift over $15,000?

Type of account (check all that apply):

Is this transfer coming from a Retirement Account (401k, 403b, IRA, Roth IRA)?

Is this transfer coming from a Trust Account?

Is this transfer coming from a Taxable Account (individual, joint, etc.)?

Is the donation a mutual fund?

Is the donation a stock security?

If the transfer is coming from a trust account, have all trustees required to bind the trust authorized this transaction?

What is the Name of the Security being transferred?

What is the Symbol of the Security being transferred?

Is there a second security being transferred?

Would you like to transfer other assets?

Would you like to transfer cash?

**Contact Liberty Hospital Foundation** if you need more information, or have questions.

Emily Morgan

Director of Advancement

816-792-7195

[Emily.Morgan@libertyhospital.org](mailto:Emily.Morgan@libertyhospital.org)