

## 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 via

- E-mail to **investmentinfo@wespath.org**

---

Organization name

---

Organization contact name

---

Phone

---

Date

---

E-mail address

---

### 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:

---

Notes/Additional instructions

DTC# 0443

Pershing, LLC

For credit to account #: N7M002242

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.

---

*(continued)*



## Instruction Form—Delivery of Equity Securities to Wespath (continued)

---

### Part 5 – Deposit Instructions

Total amount of deposit \_\_\_\_\_

Indicate the account(s) to which funds should be deposited:

<input type="checkbox"/>	_____	_____	_____	_____%
	Account name	Account number	Fund	Percent
<input type="checkbox"/>	_____	_____	_____	_____%
	Account name	Account number	Fund	Percent

If you would like to deposit the proceeds into more than two accounts, contact Wespath at **investmentinfo@wespath.org**.

---

