

STOCK TRANSFER FORM



Transfer From:

Name on Account: _____

Brokerage Firm, Address: _____

Account Name: _____

Please transfer _____ shares of _____ from the above account to:

National Financial Services, f/b/o Rocky Mountain District Kiwanis Foundation for credit to:

- Rod E. Ellerbush Commitment to Children Memorial Endowment Account #B3S-174742
- Kiwanis Pediatric Trauma Institute (KPTI) Endowment Account #B3S-174750
- Ted E. Johnson Endowment Account #B3S-174556

Transfers are cleared through National Financial Services. Please send or FAX a copy of this form to:

Summit Wealth Group
Attn: Ross Haycock, CFP,
13710 Struthers Rd. Ste. 115
Colorado Springs, CO 80921-2467
(719) 633-4033; (877) 320-2468; FAX (719) 633-4438.

(Account Owner Signature)

(Joint Owner Signature) if applicable

STOCK TRANSFER INSTRUCTIONS TO:
NATIONAL FINANCIAL SERVICES
FOR BENEFIT OF ROCKY MOUNTAIN DISTRICT KIWANIS FOUNDATION

CASH:

**ALL CHECKS MUST
BE MADE PAYABLE TO:**

National Financial Services
FBO RMDKF

Mailed to:

c/o Summit Wealth Group
13710 Struthers Rd., Suite 115
Colorado Springs, CO 80921

FED FUND WIRE INSTRUCTIONS:

ABA #021000021

Bank: JP Morgan Chase, NY

FBO: National Financial Services LLC

Beneficiary Account: 066196-221

For Further Credit To:

Rocky Mountain District Kiwanis
Foundation (Acct. # _____)

DTC ELIGIBLE SECURITIES:

DTC Clearing Number 0226
National Financial Services

OPTIONS:

This account does not accept options.

BOOK-ENTRY GOVERNMENTS

***(Bills, Notes, Bonds, Strips, GNMA's and
FNMA's)***

ABA #021000021

J.P.M. Chase/NFSC

Rocky Mountain District Kiwanis

Foundation (Acct. # _____)

OPEN END MUTUAL FUNDS:

Done via a letter of instruction provided by
Donor to Donor's sending institution to
include the following

- Delivering & Receiving acct. #s
- Positions being gifted and CUSIP#s
- Number of shares

***ALSO, CHANGE BROKER/DEALER
INFORMATION TO
NATIONAL FINANCIAL SERVICES***

**To prevent any delays in completing this delivery, please include the Foundation's name
and National Financial Service's investment account number on all correspondence.
If you have any questions, call Summit Wealth Group at 877-320-0379.**