



Giving a Gift of Stock, Mutual Funds, Bonds and other DTC eligible investments:

The Des Moines Heritage Trust is able to accept gifts of securities including: Stocks, bonds, securities, bank notes and other investments.

To transfer securities electronically to the Des Moines Heritage Trust's gift account via Depository Trust Company (DTC), provide the following DTC transfer instructions to your financial institution.

In order for the Des Moines Heritage Trust to properly credit the gift, it is important you or your broker notify the Des Moines Heritage Trust of the gift, its intended purpose and also to reference your name in the DTC transfer instructions.

The DTC instructions are as follows:

Principal

DTC Clearing Number: 0226

*For further credit to: **Des Moines Heritage Trust***

*Account Number: **GBK-002134***

Donor's name, address, name of security, number of shares, fund name/purpose

If securities are already held at Principal, donors simply need to provide written authorization to Principal to transfer the funds from the donor's account to the Des Moines Heritage Trust account.

For all securities deemed to be ineligible for DTC transfer, including Direct Treasury Account and paper stock certificates:

Please call customer service at Principal: 888-774-6267

When planning to make a gift of securities to the Des Moines Heritage Trust, please notify Tim Waddell at waddell.tim@gmail.com or 515-210-2396.

For more information on transferring your securities, please call Principal at 888-774-6267.