

**Important:**

The Letter of Instruction is **NOT** required if you are transferring cash, stock certificates or securities held at Univest.

The Letter of Instruction **IS** required if you are transferring securities held outside Univest. Please complete the letter (which appears on the next page) and submit it as follows:

**For Securities held outside Univest:**

Send to the Univest Foundation:

- **Original** Letter of Instruction
- **Copy** of a recent statement from the current broker or mutual fund company
- Donor Application **or** Additional Contribution form

**Please mail completed form to:**

Univest Foundation  
14 North Main Street  
P. O. Box 64197  
Souderton, PA 18964

DATE

DELIVERING BROKER / DEALER NAME

ADDRESS

CITY STATE ZIP

( )  
PHONE

Dear \_\_\_\_\_ :  
NAME OF BROKER

Please accept this letter as my/our authorization to irrevocably transfer a portion of the positions from my/our account with your firm.

ACCOUNT NUMBER(S):

1. \_\_\_\_\_ shares of \_\_\_\_\_  
NUMBER OF SHARES NAME OF SECURITY
2. \_\_\_\_\_ shares of \_\_\_\_\_  
NUMBER OF SHARES NAME OF SECURITY
3. \_\_\_\_\_ shares of \_\_\_\_\_  
NUMBER OF SHARES NAME OF SECURITY
4. \_\_\_\_\_ shares of \_\_\_\_\_  
NUMBER OF SHARES NAME OF SECURITY

Sincerely,

**Signature Guarantee**

SIGNATURE

NAME (please print)

SIGNATURE

NAME OF BANK OR FIRM PROVIDING SIGNATURE GUARANTEE

NAME (please print)

SIGNATURE / TITLE OF OFFICER

**SECURITY DELIVERY INSTRUCTIONS:**

Securities to be delivered to Uninvest Foundation through our custodian bank Uninvest National Bank & Trust Co. through the Institutional Delivery (ID) System of the Northern Trust Company should be transferred to the account of:

**Uninvest Foundation**  
Uninvest National Bank & Trust Company  
**Custodian Account #17-95029**  
Institutional ID #28375  
Agent Bank #20290  
Agent Clearing (DTC) #2669