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THE
CHAMPION
of TREES

THE MORTON ARBORETUM GIFT DELIVERY INSTRUCTIONS

For Mutual Funds

Last Updated November 13, 2025

GIFTS OF MUTUAL FUND SHARES TRANSFER

FACILITATED BY THE MORTON ARBORETUM

Please complete the information below and send it to [Patty Arend](#) to facilitate the transfer process with Principal (PCS), the Arboretum's brokerage account holder.

Donor Information	Donation Information
Donor Full Name: Street Address: City, State ZIP: Phone Number: Email:	Cusip Number: Asset Name: Ticker Symbol: Number of Shares: Cost Basis: Broker/Rep. Full Name: Broker/Rep. Contact Info:

MUTUAL FUNDS

Open-End Mutual Fund Delivery Instructions

Please contact: Client Service Associate **Kaitlyn Liles** at (254) 265-6403

Please send to both email addresses when sending directives:

liles.kaitlyn@principal.com & pcstexasccsc@principal.com

Closed-End Mutual Fund Delivery Instructions

Please contact: Client Service Associate **Kaitlyn Liles** at (254) 265-6403

Please send to both email addresses when sending directives:

liles.kaitlyn@principal.com & pcstexasccsc@principal.com

The Morton Arboretum Contact

Sarah Thompson

Director of Development Operations

sthompson@mortonarb.org

P: (630) 725-2043

C: (614) 579-8172 (cell/text)

F: (630) 719-2421

Principal Financial Group Contact

Kaitlyn Liles P: (254) 265-6403

Client Service Spec - Trust & Custody F: (833) 695-2851

Please send to both emails: liles.kaitlyn@principal.com & pcstexasccsc@principal.com

Address: RIS Principal Custody Solutions | Principal Financial Group | Waco, TX 76710