

## **Delivery Instructions for Gifted Securities**

### Receiving Firm Information:

SPTC FBO Heartland Financial USA  
Tax ID Number: 42-6260175  
Address: Wealth Advisory Services  
1398 Central Avenue  
Dubuque, IA 52001

### Delivery Instructions for all DTC eligible securities:

Receiving Firm: SPTC FBO Heartland Financial  
DTC #: 2663  
Agent Internal Account: 20053-C  
Clearing Firm: SEI Private Trust Company

For Further Credit to: Lifeworks Services, Inc.  
Tax ID Number 41-0907857  
Account #0062700

Please notify Laura Purfeerst, Vice President of Finance at 651-365-3722 or [lpurfeerst@lifeworks.org](mailto:lpurfeerst@lifeworks.org) when a stock gift has been initiated.