

## Procedure for making a Gift of Stock to Eskenazi Health Foundation

*Gifts of securities are simple to donate and may provide favorable tax benefits. Appreciated securities, held for more than one year, may be deducted from taxable income without paying a capital gains tax on the appreciated portion of the gift.*

Gifts of securities are credited on the date of transfer to Foundation and are valued at the mean of the high and low quoted sales price on that day.

Stock may be donated as follows:

By electronic transfer Depository Trust Company (DTC) of the shares between your broker and Foundation's broker at Stifel Nicolaus. Please call the Development office at 317.880.4906 to notify Foundation of your plans to make a gift of stock. Stock transferred in this fashion is valued on the date of the transfer.

Broker: Stifel Nicolaus

Contact person: Amanda Arbeene, 317-571-4528

Account Name: Eskenazi Health Foundation Gifting Account

Account #: 8148-8659

DTC #: 0793

Tax ID #: 31-1132066

From whom the stock gift is credit of: \_\_\_\_\_

Name of Donor

Purpose of Gift: \_\_\_\_\_ (indicate if unrestricted)

No purpose indicated is assumed to be unrestricted.

It is important for us to know the identity of the donors of all securities gifts in order to give prompt and accurate credit for all gifts received. Particularly in the case of an electronic transfer, it is often very difficult to obtain this information after the transaction is processed. Therefore, in addition to instructing your broker to include your name and address in the DTC transfer instructions, please contact:

Trey.everly@eskenazihealthfoundation.org

Phone: 317.880.4906

720 Eskenazi Avenue

Fifth Third Bank Building

Indianapolis, IN 46202