

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 Eskenazi Health Foundation's investment custodian at Fifth Third Bank. Please call our office at 317.880.4900 to notify us of your plans to make a gift of stock. Stock transferred in this fashion is valued on the date of the transfer.

Donors should instruct their brokers that the following information is needed to process their gift:

Investment Custodian: Fifth Third Bank
DTC Eligible Securities
Participant Number: 2116
FFC A/C#: 650009886151
A/C Name: ESKENAZI HLTH FD INC GIFT ACC
Agent Bank #: 10016
Institutional ID#: 11153
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