

## Major Hospital Foundation

### Instructions for Donors: Making Gifts of Publicly Traded Securities

The Major Hospital Foundation accepts gifts of publicly traded securities. The following instructions are for donors who wish to make such gifts to the Foundation.

#### **If the donor holds the certificates:**

Do not endorse the certificates. Please mail them via U.S. Postal Service (certified mail and insured for three percent of market value) without any endorsement or assignment along with a letter stating the purpose of your gift to:

Major Hospital Foundation  
150 West Washington Street  
Shelbyville, IN 46176

In a separate envelope, please send one endorsed stock power form per certificate. Endorse each form exactly as your name or names appear on the front of your certificate(s) and have the signature guaranteed by your broker or banker. Do not include any other information on the stock power form – *only your signature*. This will prevent your securities from being readily negotiable. Include a copy of your letter stating the purpose of your gift. Send the form to the Major Hospital Foundation.

Your stock certificates will not be negotiable until we have received both envelopes from you, so this is a very safe way to transfer your stock to the Major Hospital Foundation.

#### **If the donor's broker or banker holds the securities:**

Please call your broker or banker and let them know that you want to make a gift of stock to the Major Hospital Foundation. He/she will want to know the name of the stock and the number of shares you are contributing. Request him/her to advise the Major Hospital Foundation by calling Angela Gill, Executive Director of the Foundation (317-421-0361). Angela will promptly give your broker or banker instructions for the disposition of your gift and provide him/her with the Foundation's federal I.D. number.

You should send a letter confirming your instructions to your broker or banker. A copy of the letter should be sent to the Foundation at the above address.

Please remember that you do not want to tell your broker to sell the stock and forward the proceeds to the Major Hospital Foundation. This will jeopardize the excellent tax benefits you would receive if the Foundation arranges for the disposition of the stock.

**For electronic transfer of the securities:**

Security transfers to the Major Hospital Foundation may be made by electronic transfer through:

Raymond James & Associates, Inc.  
FAO: Major Hospital Foundation, Inc., Account # 14384131  
P.O. Box 12749  
St. Petersburg, FL 33733-2749

The donor's broker or banker will need the following numbers:

DTC No.: 0725  
Major Hospital Foundation Account No.: 14384131  
Major Hospital Tax ID No.: 23-7119980

Securities will be valued as of the date of delivery as defined below:

Type of Delivery	Delivery Date
Electronic Transfer (please call the Foundation for information needed prior to transfer)	Date securities received in the Foundation custodial account.
Personally delivered to the Foundation or received by a Foundation representative	Date received by the Foundation representative or delivered to the Foundation
Mailed to the Foundation by the donor.	Date certificates are mailed (postmark date on the envelope provided securities are received by the Foundation in the ordinary course of mails).
Delivered to donor's broker or agent and he/she mails to the Foundation	Date certificates are mailed to the Foundation by the broker (provided securities are received in the ordinary course of mails).
Delivered by donor to his/her bank or broker (as donor's agent) or to issuing corporation (or its agent) instructing corporation to reissue in the Foundation's name.	Date stock is transferred to the Foundation's name on corporation's books. (This is the date on the new certificate issued in the Foundation's name).

The fair market value assigned to gifts of securities is the mean between the highest and lowest quoted selling price on the date of delivery of the gift. The Foundation will notify the donor with amount of his/her contribution deduction based on the date that the transfer is completed.