



Healthcare Foundation

Gift of Stock

We are very grateful for your intention to make a gift of stock to Presbyterian Healthcare Foundation (PHF).

When the gift is received, you will be sent an acknowledgement documenting for tax purposes the value of the gift on the date of receipt. Any gift designation will be restated in your letter.

We want to provide information to share with your broker or financial advisor that will help them complete your special gift and transaction. Please give the following information to your broker:

PHF Broker: Principal Custody Solutions ID #00078861
Contact: Vanessa Fulton or Jessica Platt
pcsmplscsc@principal.com
(612) 478.3626

DTC (routing number): 2925

Presbyterian Healthcare Foundation Account number: 15201287

If transferring physical securities or non-DTC avenue, please contact Jessica Platt for special instructions.

Donors' broker should be prepared to provide the following information to PHF/Principal:

- Name of Donor/s
- Name of shares being transferred
- Number of shares
- Delivering Firm DTC or NSCC Participant Number

Important: To ensure your gift of securities is processed accurately and timely, please contact the Foundation at (505) 724.6580 or rscott4@phs.org to alert PHF of your transaction. Please indicate the company name and number of shares.

Note: If you plan to make a stock gift in December, please try to do so before December 23 to allow time for the transfer successfully before year end.

The stock gift will be valued at the average price per share on the date the stock is received by Principal on behalf of PHF. If you have further questions, please contact Rick Scott in the foundation office, (505) 724.6580 or rscott4@phs.org