



## Gift of Securities Instructions

We are very grateful for your intention to make a gift of securities.

When the gift is received, you will be sent an acknowledgement documenting for tax purposes the value of the gift on the date of transfer. 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:

Presbyterian Healthcare Foundation broker: Merrill Lynch  
Karen Bard, assistant Angela Ipock @ 505-884-9892  
DTC (routing number): 5198  
Account number: 43307K14

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

**Important: To ensure your gift of stock is processed accurately and timely, please call the Foundation at 505-724-7509 to alert us to your transaction. Please indicate the company name and number of shares.** Please also inform us if you'd like to direct your gift to a specific program or specialty, or if it's undesignated to be used where need and opportunity are greatest.

If you have further questions, please contact Rick Scott in the Presbyterian Healthcare Foundation office, 505-724-7509 or [rscott4@phs.org](mailto:rscott4@phs.org). Thank you for your generosity.