

How to Make a Gift of Stock or Bonds

Thank you for considering a gift of securities to support our mission. Giving appreciated stock or bonds is a tax-savvy way to make a gift because you avoid paying capital gains taxes on the amount of your gift. Advocate Charitable Foundation receives all gifts of securities on behalf of Advocate Health Care's hospitals and programs.

Making a gift of stock or bonds

- Provide your broker with written instructions to transfer the specified shares electronically into the name of Advocate Charitable Foundation using the following DTC instructions:

DTC #2669, for further credit to Account #26-98660 - *This is a Northern Trust Company account in the name of Advocate Charitable Foundation.*

- Please send us a copy of your written commitment along with a letter or email specifying which hospital or program you want your gift to benefit. Contact information is below.
- The gift will be valued on the date the securities are received into the Foundation's account. The value of your gift will be determined by using the average of the high and the low trades on the date the gift was received.
- You should **NOT** allow your broker to sell appreciated securities and send us a check. Transferring the securities directly to the Foundation will allow you to avoid any capital gains taxes that would be due upon the sale of the securities.
- The use of securities to fund a gift annuity requires special handling. For instructions, contact Megan Fergus at 630.929.6909.

For more information:

Please do not hesitate to contact a member of the Foundation's Finance Team with questions or concerns.

Pat Smith-Calascibetta
630.929.6965
patricia.smith-calascibetta@advocatehealth.com

Megan Fergus
630.929.6909
megan.fergus@advocatehealth.com

Advocate Charitable Foundation
3075 Highland Parkway, Suite 600
Downers Grove, IL 60515

Phone: 630.929.6900
Fax: 630.929.9900

www.advocategiving.giftplans.org

Tax ID: 36-3297360

Note: This information is intended to be for educational purposes and should not be considered legal, tax or accounting advice. You should consult with your professional advisors for applicability to your own situation.