



# WhidbeyHealth Foundation

## STOCK GIFT FORM

To make a contribution of stocks, fill out the form below, give the top half to your broker, and return the bottom half to WhidbeyHealth Foundation. It is important that you notify WhidbeyHealth Foundation so we can provide you with an accurate receipt.

To ensure proper crediting of your gift, please instruct your broker to include the full donor name on your account. Please differentiate between individuals and family foundations as appropriate.

Dear \_\_\_\_\_ (your brokerage firm name)  
Re: \_\_\_\_\_ (your brokerage account number)  
Client: \_\_\_\_\_ (your name on the account)  
Please transfer through DTC \_\_\_\_\_ shares of my \_\_\_\_\_ stock to:

DTC# \_\_\_\_\_ brokerage name  
Attn.: broker name  
Account # \_\_\_\_\_  
Account name \_\_\_\_\_

*NOTE: Please use Whidbey Island General Hospital Foundation or WhidbeyHealth Foundation when transferring the stock. These are the legal names of the foundation.*

\_\_\_\_\_  
Signature Date

For additional information contact Helen Taylor at 360.678.7656.ext 4020 or [taylor@whidbeyhealth.org](mailto:taylor@whidbeyhealth.org)

To: Helen Taylor, Executive Director  
WhidbeyHealth Foundation  
PO Box 641  
Coupeville, WA 98239

Dear Helen:

Today, \_\_\_\_\_ (date), I instructed by broker, \_\_\_\_\_ (brokerage firm name) to send \_\_\_\_\_ shares of \_\_\_\_\_ (company name) \_\_\_\_\_ (stock symbol) to WhidbeyHealth Foundation account at \_\_\_\_\_ (hospital foundation account). Please send a receipt to me at the address below so I can take a tax deduction for the value of my gifts.

Name \_\_\_\_\_ Broker's Name \_\_\_\_\_  
Address \_\_\_\_\_  
Phone Number \_\_\_\_\_ Fax number \_\_\_\_\_



# WhidbeyHealth Foundation

## Brokerage Account

### Stock Transfer to:

Wells Fargo Investment Advisor

DTC: 0141

Account # 1910-3527

Whidbey Island General Hospital Foundation or WhidbeyHealth Foundation

Advisor: Robert (Bob) Hoefel at 360-754-3459

Assistant: Donna at 206-292-3172

Customer Service: 866-281-7438

### Wire Transfer to:

Wire from:

Bank Information Wells Fargo Bank-Investment Advisors

ABA:

Account:

Bank:

Address:

City, State, Zip

Business or Personal

Wire for:

Whidbey Island General Hospital Foundation

101 N. Main St

Coupeville, WA 98239-3413

Reason: donation