

# GIFT OF STOCK INSTRUCTIONS

When transferring appreciated stock directly from your account to Hoag Hospital Foundation's account at RBC Wealth Management:

- ☐ Wire transfers take place with numbers, not names, so in order for us to match up your gift of stock upon receipt, **please call Julie Heggeness at (949) 764-7206** with the following information:
  - Stock Name
  - # of Shares
  - Date of Transfer
  - Intent of Gift (Restricted/Unrestricted – to which area of the hospital you would like your gift designated)
  - Donor Name & Address
- ☐ Make sure your broker understands that the stock is to be transferred, and NOT liquidated.
- ☐ Our representative agent at RBC is:
  - Martin Klein at (949) 720-8944
- ☐ The Hoag Hospital Foundation account number is:
  - 317-08206
- ☐ The DTC number is:
  - 0235
- ☐ Hoag Hospital Foundation Federal Tax ID number is:
  - 95-3222343
- ☐ Hoag Hospital Foundation is a tax-exempt 501(c)(3) corporation.

For more information, contact Julie Heggeness, JD, CSPG, TEP,  
Vice President, Legal & Executive Director, Gift Planning  
Hoag Hospital Foundation, at (949) 764-7206 or [Julie.Heggeness@hoag.org](mailto:Julie.Heggeness@hoag.org)  
or visit us online at [www.HoagHospitalFoundation.org](http://www.HoagHospitalFoundation.org)