

GIFT OF STOCK INSTRUCTIONS

When transferring appreciated stock directly from your account to Hoag Hospital Foundation's account at Northern Trust Company:

- ☐ Wire transfers take place with numbers, not names, so in order for us to match up your gift of stock upon receipt, **please call Cassie Banagas at (949) 764-7374** 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 Northern Trust is:
 - Sanjay Patel at (312) 444-7479 or sp90@ntrs.com
- ☐ 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:

Cassie Banagas

Director, Gift Services

Hoag Hospital Foundation

O: (949) 764-7374

Cassie.Banagas@hoag.org

www.HoagHospitalFoundation.org