LEGACY HEALTH

There are several ways to transfer securities to Legacy Health:

1. Electronic transfer
2. Mailing
3. Hand delivery

1. ELECTRONIC TRANSFER

The most popular and efficient way to transfer securities to Legacy Health is by electronic transfer. If your stock is held at a brokerage firm, notify the broker that you wish to make a gift of securities to Legacy Health. Your broker will need written authorization from you before they can make the transfer. Be sure to tell them the name of the stock you want to transfer, the number of shares and where you would like your gift to be designated when it reaches Legacy Health. A Legacy Health stock transmittal form (*available on the next page*) can be used in place of a letter. Please mail or fax a copy of your authorization letter or the stock transmittal form to the following:

Judy Rooks
Senior Director of Philanthropy Operations
The Office of Philanthropy, Legacy Health
PO Box 4484
Portland, OR 97208
Fax: 503-413-6447

2. MAILING STOCK CERTIFICATES

If your securities are not held at a broker then you can either mail or hand deliver the certificates directly to Legacy Health's Office of Philanthropy. If mailing, send your **unendorsed** certificate(s) and a cover letter (including your name, address, and purpose of the gift) in an envelope. In a separate envelope, send a signed, signature guaranteed stock power. We strongly recommend using registered mail to forward your certificates and stock power. A stock power form can be obtained at your local bank or by calling The Office of Philanthropy at 503.415.4700.

> **NOTE**: *Please DO NOT mail endorsed certificates. Once the certificate is endorsed, it is legal tender and can be exchanged by anyone. It is strongly recommended certificates not be sent to a transfer agent for registering in Legacy Health's name. This procedure is unnecessary and results in needless delays of the transfer.*

3. HAND DELIVERY

Certificates may be given to an Office of Philanthropy officer or delivered to The Office of Philanthropy at 2145 NW Overton, Portland, Oregon.

VALUATION OF STOCKS AND BONDS, OR GIFT CREDITING

For information regarding the valuation of stocks and bonds, or gift crediting, please contact The Office of Philanthropy at 503.415.4700.

The Office of Philanthropy

LEGACY HEALTH

STOCK DONATION BROKERAGE TRANSFER AUTHORIZATION FORM (To be completed by the donor)

Date: _____

To:

_____ Donor's Financial Advisor/Broker/Planner Address

_____ Address

_____ Phone Number/Fax Number

_____ City State Zip

From:

_____ Donor/Client's Signature Print Name

_____ Print Name

_____ Donor/Client's Signature Print Name

_____ Print Name

_____ Donor/Client's Address

_____ City State Zip

_____ Donor/Client Phone (circle one) Work/Home/Cell

_____ Email

RE: Account No.: _____ **Please transfer** _____ **shares of** _____ **to:**
number of stock name

The Office of Philanthropy (select one)	***Acct#***	***Dtc#***	***EIN #***
☐ Emanuel Medical Center Foundation	3944-9974	0141	93-6095667
☐ Good Samaritan Foundation	6088-7960	0141	23-7017276
☐ Meridian Park Medical Foundation	4523-2520	0141	93-0773410
☐ Mount Hood Medical Center Foundation	6088-7960	0141	93-0794951
☐ Randall Children's Hospital Foundation	1115-0631	0141	93-1314469
☐ Salmon Creek Hospital Foundation	6088-7960	0141	83-0433165

Designation: _____

My/our stock gift is: ☐ A NEW GIFT ☐ PAYMENT ON A CURRENT PLEDGE ☐ ANONYMOUS

I would like to have my shares sent via DTC to the following account at Umpqua Investments. Prior to transfer, please contact:

John Bacialli at Umpqua Investments: Toll free: 800.452.1929 ▪ Local: 503.226.7000 ▪ Fax: 503.226.0202

To aid in proper gift acknowledgement/tax documentation, we ask your broker to please send a fax copy to:
Maureen A. Bradley, Sr. Vice President & CDO, The Office of Philanthropy, Legacy Health. Fax: 503.415.5788