

## 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:

Attn: Gift Processing  
Legacy Health - Philanthropy & Community Engagement  
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 Philanthropy & Community Engagement 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 a foundation gift officer or delivered to Philanthropy & Community Engagement 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 Philanthropy & Community Engagement at 503.415.4700.

**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

Philanthropy & Community Engagement (select one)		Acct#	Dtc#	EIN #
<input type="checkbox"/>	Good Samaritan Foundation	6088-7960	0141	23-7017276
<input type="checkbox"/>	Legacy Health Foundation	1313-0660	0141	46-5562403
<input type="checkbox"/>	Legacy Emanuel Medical Center			
<input type="checkbox"/>	Legacy Meridian Park Medical Center			
<input type="checkbox"/>	Legacy Mount Hood Medical Center			
<input type="checkbox"/>	Unity Center for Behavioral Health			
<input type="checkbox"/>	Randall Children's Hospital Foundation	1115-0631	0141	93-1314469
<input type="checkbox"/>	CARES Northwest			
<input type="checkbox"/>	Salmon Creek Hospital Foundation	6088-7960	0141	83-0433165
<input type="checkbox"/>	Silverton Health Foundation	3508-9077	0141	93-0913392

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:  
The Office of Philanthropy & Community Engagement, Legacy Health. Fax: 503-413-6447