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 1919 NW Lovejoy Street, 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:

[Space for address and phone number]

From:

[Space for address and phone number]

RE: Account No.: ____________________________

Please transfer ____________ shares of ______________ to:

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<th>Philanthropy &amp; Community Engagement (select one)</th>
<th>Acct#</th>
<th>Dtc#</th>
<th>EIN #</th>
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<td>□ Good Samaritan Foundation</td>
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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 US Bank. Prior to transfer, please contact:

Courtney Koch at U.S. Bank Wealth Management: Phone: 503.697.3128 • Fax: 503.636.8002

To aid in proper gift acknowledgement/tax documentation, we ask your broker to please send a fax copy to:

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