

TRANSFER OF STOCK OR OTHER SECURITIES TO PARDEE HOSPITAL FOUNDATION

If you own securities, such as stocks, bonds, or mutual funds, contributing the actual securities is often more tax-wise than cash. This is because a gift of appreciated stock generally offers two-fold tax savings. First, you avoid paying capital gains on the increase in the security value. Second, you receive a charitable contribution deduction for the full fair market value of the security at the time of the gift. Please review these tax benefits with your tax advisor to determine which benefits are specific to you.

Thank you for your desire to donate securities to the Pardee Hospital Foundation. The brokerage firm that represents the Foundation to process stock gifts is:

First Citizens Wealth Management

DTC participant# 5409
DTC account# 742094014

First Citizens Bank
FCB Mail Code: 013

128 South Tryon St., Ste. 300
Charlotte, NC 28202
(704) 338-4396

1. If you are transferring stock from another broker to the above Pardee Hospital Foundation account, please instruct your brokerage firm to transfer the securities to the above address.
2. If you are transferring stock from your own First Citizens account, send your broker instructions directing the firm to transfer the shares to the Foundation account (#680254018).
3. Electronic transfer is the most convenient method. Please inform the Foundation office of your donation so we can send the proper documentation for income tax purposes.

If there are any questions about these instructions, please contact the Pardee Foundation Office at (828) 233-2700 or send an e-mail to us at pardeehospitalfound@unchealth.unc.edu