

**TRANSFER OF STOCK OR OTHER SECURITIES TO PARDEE HOSPITAL FOUNDATION**

If you own securities, such as stocks, bonds or mutual funds, it is often more tax-wise to contribute the actual securities than cash. This is because a gift of appreciated stock generally offers a two-fold tax savings. First, you avoid paying capital gains on the increase in the value of the security. 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 specific benefits to you.

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Thank you for your desire to donate securities to Pardee Hospital Foundation. The brokerage firm who represents the Foundation for the purposes of processing 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 that we can send the proper documentation for income tax purposes.

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