

# Stock and Securities Transfer



Stock or securities transfers to Adventist Health Rideout Foundation arrive with no accompanying donor information. In order for us to identify and properly acknowledge your gift, please complete the form below. In the event you have already transferred stocks or securities and have not been acknowledged, please complete the form below to alert our team of your gift.

## Gifts of Stocks and Securities

Donor security transfers are made in one of three ways:

- Electronically (DTC)
- Physical Certificate—Donor's Name
- Physical Certificate—The Fremont-Rideout Foundation

Note: One of the following procedures must be used for each and every marketable security transfer (stocks, bonds, mutual funds). Following the procedures identified below will ensure that proper credit is given to the donor.

### Electronic Transfer (DTC)

To transfer securities held in a brokerage account, the donor should instruct their broker to transfer the securities to the following Foundation account:

**Participant DTC #2925**  
**Agent Bank ID #78861**  
**Principal Account #-14054037, Adventist Health Working Capital - General Purpose**

Upon Completion of the DTC, please

1. Request broker send confirmation of transfer to the Adventist Health Rideout Foundation. The confirmation should indicate the donor's name, the security being transferred, the Foundation account you would like your gift designated to and the date of transfer.
2. Complete this form and send to the Adventist Health Rideout Foundation so that gifts can be properly credited.

### Physical Certificate — Donor's Name

Donors wishing to give securities that are held in physical form (e.g., stock certificates) and are registered in their names, should contact our office at 530-751-4070 or [Giving@ah.org](mailto:Giving@ah.org)

### Mailing or Delivering Certificates

Authorization letters, this form, certificates, and stock or bond power, or re-registered physical documents should be mailed or delivered to:

**Adventist Health Rideout Foundation**  
**414 G Street #130**  
**Marysville, CA 95901**

Please call our office with any questions about gifts of securities at 530-751-4070.

This form may be sent electronically to: [Giving@ah.org](mailto:Giving@ah.org)

## Stock or Securities Information

Anticipated Transfer Date

Brokerage Name

Broker/Financial Office Contact Name

Broker/Financial Office Phone Number

Types of Stock (Name/Symbol)      Number of Shares  
\$

Estimated Value

### Gift Designation

- Market/Hospital 612 - AH + Rideout
- Specialty/Service \_\_\_\_\_
- Fund \_\_\_\_\_
- Event \_\_\_\_\_

## Donor Information

Dr.    Mr.    Mrs.    Ms.   OR    Business

Primary Donor Name (as you would like it acknowledged and credited)

Spouse/Partner Name (for joint gifts) OR Business Primary Contact Name

Address

City      State      Zip

Phone    Cell    Home    Work   Email

I/we prefer this gift to be anonymous.

Signature (required)

Date