



## STOCK, ACH & WIRE TRANSFER INSTRUCTIONS

*THANK YOU in advance for your gift to the Beebe Medical Foundation!*

Giving appreciated securities, or a gift through an IRA rollover, or an ACH are all convenient ways to support the Beebe Medical Foundation while gaining tax advantages. As a donor you receive an income tax deduction for the full market value on the date of the gift (if stock/security has been owned greater than twelve months). In addition, most donors avoid capital-gains tax otherwise due on the sale of securities/stocks.

### How to Donate Securities/Stocks

There are two options to electronically transfer stocks. The average of the high and low of your securities on the day of the transfer is the amount credited to you as your gift to the Foundation.

1. Your broker can transfer your securities/stocks to the firm with a Beebe Medical Foundation account **(FEIN 51-0319455)**.
2. Your broker could choose to set up an account at your brokerage in the name of Beebe Medical Foundation and transfer your securities into this account, sell the securities and send the proceeds to the Beebe Medical Foundation.

### Broker Information

*For DTC Eligible Securities:*

DTC Participant #990

Account Name: Beebe Medical Foundation-Short Term Pool

Account Number: 119959-000

Attention: Erik Saville, (302) 636-5220

### Securities Notification

Unfortunately, when funds are transferred electronically, the donor's name is not always included in the transfer information. By letting us know of your gift, we will be able to properly match the stock that we received with your gift record. Please call or write us with the following information:

- Name of stock transferred
- Number of shares
- Brokerage firm stock transferred from
- How you would like the gift used at the Foundation

### For Cash, ACH & Wire Transfers

A B A #031302955

Bank Name & Address: M&T Bank – 110 North Market Street, Wilmington, DE 19801

For Further Credit: Beebe Medical Foundation

Account Number: 26240522

Wire A B A #022000046

### -----CONTACT US-----

**David Szumski**

Gift Officer

[dszumski@beebehealthcare.org](mailto:dszumski@beebehealthcare.org)

302-644-2900 x70215

**Kay Young**

Executive Director of Development

[ayoung@beebehealthcare.org](mailto:ayoung@beebehealthcare.org)

302-644-2900 x70213

**Justen Albright**

Financial Analyst

[jalbright@beebehealthcare.org](mailto:jalbright@beebehealthcare.org)

302-644-2900 x70226