

SECURITIES GIFTING INSTRUCTIONS

There are many tax benefits when you donate appreciated securities to Valleywise Health Foundation. Interested in learning more? Please contact our team at **602-612-9965** or **kfassett@valleywisehealthfoundation.org**.

JP Morgan Securities, LLC will process the transfer. When this takes place, please contact Kate.

DTC Gifting Instructions:

Firm: JP Morgan Securities, LLC

DTC#: 0352

Account #: 420-63680

Account Name: Valleywise Health Foundation

Contact:

Dan Johnson,

Business Management Specialist

214-979-7995

daniel.g.johnson@jpmorgan.com

Please email this completed form to our team so that we may fully recognize your gift.

Name of Person Donating: _____

Address: _____

Phone Number: _____

Email: _____

Expected Transfer Date: _____

Number of Shares: _____

Type of stock (Name): _____

Name of your Brokerage Firm: _____

Contact Name: _____

Contact Phone: _____

Contact Email: _____

The dollar value of your gift will be determined by the daily average on the date of the transfer.
This amount will be reflected on a receipt provided by the Valleywise Health Foundation.

Thank you **FOR YOUR GENEROUS SUPPORT!**