

## 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 **602-678-9031** or [foundation@valleywisehealth.org](mailto:foundation@valleywisehealth.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](mailto: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!**