



**To give your gift of stock held by your stockbroker or banker:**

1. Review your securities and select those that have increased in value. The wisest strategy from a tax-planning standpoint is to usually give assets you would otherwise consider selling. (To deduct gifts of appreciated securities at their full present value, you must have owned them for at least a year and a day. The gifts are deductible up to 30% of your adjusted gross income in the year of the gift. Any excess may be deducted over the next five years.)
2. After deciding which securities you will give and the amount of your gift, instruct your broker to transfer the securities to one of the following accounts:

**UBS Financial Services –**  
Billings, Montana; 406/657-8600  
Advisor: Tim Schruth / Jodi

**DTC Clearing #: 0221**  
**St. Vincent Healthcare Foundation Account #: BK 31389**

**Capstone Wealth Management —**  
Billings, Montana; 406-259-4939  
Advisor: Nick Cladis / Tracy Hawbaker

**DTC Clearing #: 0226 (Fidelity Investments)**  
**St. Vincent Healthcare Foundation Account #: 672-758361**

**RBC Dain Rauscher –**  
Billings, Montana; 406/252-6306  
Advisor: Bill Tierney / Sally

**DTC Clearing #: 0235**  
**St. Vincent Healthcare Foundation Account #: 110176132000**

**Request that shares be delivered on a free basis since the purpose of this transfer is to complete a charitable gift.**

*If you prefer to have the stock stay with your personal brokerage firm, the St. Vincent Healthcare Foundation will set up an account with your broker to hold the stock until it is needed.*

3. Copy stock-transfer letter to St. Vincent Healthcare Foundation, 1106 North 30th Street, Billings, MT 59101.

**Please note: If you wish to make a gift of mutual funds, please contact your broker or the mutual fund company for specific instructions. A gift transfer of mutual funds can take several weeks so you will need to allow ample time to complete this gift arrangement.**

**Contact: Joan Hendricks, Senior Philanthropic Advisor, SVH Foundation, 1106 North 30<sup>th</sup>, Billings, MT 59101; 406/237-3639; e-mail: joan.hendrick@svh-mt.org**

### **To give gifts of stock held in your physical possession:**

1. If you wish to gift stock certificates that you hold in your physical possession you can deliver the stock certificates to St. Vincent Healthcare Foundation, 1106 North 30<sup>th</sup> Street, Billings, Montana, then:

Sign the back of the stock certificates, making the certificates immediately negotiable. You should sign your name exactly as it appears on the stock certificates. (This method is appropriate only if the certificates are hand delivered.)

Another method of transferring the stock certificate is to:

Sign a stock power for each stock certificate that will be transferred to the St. Vincent Healthcare Foundation. (A stock power is a document that allows the SVH Foundation to sell the securities. Stock powers can be obtained from a broker, bank, or business stationery store.)

If you wish to transfer your stocks by sending them through the mail, the stock powers should be sent to the St. Vincent Healthcare Foundation in a separate envelope, apart from the stock certificates. (Because the stock certificates are not negotiable without the stock powers, donors can ensure their safety by sending them separately.)

### **If giving non-stock types of securities such as bonds, notes, or mortgages, specific advice of your broker or other professional advisor should be obtained.**

*Your gift can be unrestricted as to its use or restricted for a specific Foundation program such as Ronald McDonald Care Mobile, Health Care Education Endowment, Pediatric Greatest Needs, Greatest Needs, or several other options that best fit your charitable goals.*

*Should you have any questions when completing the transfer of securities, please call St. Vincent Healthcare Foundation, 406/237-3639 and speak with David Irion, Joan Hendricks, or Karin Lucas.*