

Take Stock in Your Philanthropic Goals

Did You Know?

The Orlando Health Foundation accepts gifts of appreciated stock to benefit Orlando Health hospitals or programs.

Donating stock is a tax-smart way to have an immediate impact on the lives of our patients and families. In exchange for your gift, you will receive a tax deduction for the full value of the stock while avoiding the payment of capital gains taxes.



How It Works:

- 1 Notify your broker that you wish to transfer stock to the Orlando Health Foundation, and provide them with the following information:

DTC:

2039 (SEI Private Trust Company)
FFC Truist Bank

Name on Account:

Orlando Health Foundation, Inc.

Account Number:

7923356

- 2 Complete the stock transfer by asking your broker to contact Truist Bank at:
Phone: (404) 724-3556
Email: TruistBankGiftClearing@Truist.com
- 3 Truist notifies the Foundation when a stock transfer occurs, and the Foundation promptly sells the shares. This enables your gift to have an immediate impact.
- 4 We will provide you with documentation listing the amount of your donation per IRA guidelines, which can be claimed for a tax deduction up to 30% of your adjusted gross income in the year of your gift.

For more information,
please contact:

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