

## 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](mailto: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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