

GIFTS OF STOCK

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 quick and easy way to have an immediate impact on the lives of patients and families being treated at our hospitals. Plus, it provides 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:

Beverly Glenn, Truist Bank Gift Administrator

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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