

MARTIN HEALTH FOUNDATION

Gifts of Securities Guidelines

Gifts of long-term, readily marketable securities will be gratefully accepted by the Martin Memorial Foundation, Inc. The tax exempt Foundation is a 501 (c)(3) not-for-profit organization (Federal Tax ID # 59-2343938). Donors do not have to recognize the appreciation on capital gain.

To avoid confusion, it is always helpful to have the donor send their transfer agent a letter or e-mail of instructions stating the number of shares to be transferred, the stock name and the purpose of the gift, and send a copy to the Foundation at the address below. This method of giving can be accomplished in a number of ways which are outlined below.

Donors may instruct their broker or agent to transfer securities to Martin Memorial Foundation, Inc. as follows:

UBS Financial Services
712 S.E. Ocean Blvd.
Stuart, FL 34994
Account # RW16410
DTC # 0221

Contact Marty Sloane, senior vice president, investments, (772) 283-8201 or Debbie Vincent, senior registered client service associate, (772) 283-8201.

Unendorsed donated certificates can also be sent by certified or registered mail, or hand delivered with a letter of instructions. A stock power should be sent in a separate envelope for each certificate, again using certified or registered mail to the address below. Please do not include any information on the stock power other than the donor's signature and date.

To contribute mutual fund shares, please contact the Martin Health Foundation. Each mutual fund company establishes its own procedure for transferring shares. We can help with the appropriate letters of instruction.

Please Contact Us

Please contact Jessica McLain at (772) 223-5634 or Jessica.McLain@MartinHealth.org to let us know to expect your gift of securities. Brokerage firms do not release donor names to our office (for your protection), and we wish to thank you for your gift in a timely manner.