



**WakeMed Foundation**

3000 New Bern Avenue  
Raleigh, NC 27610

Email: [foundation@wakemed.org](mailto:foundation@wakemed.org)  
919 350-7656  
Fax 919 350-8671

# MAKING A GIFT OF STOCK TO THE WAKEMED FOUNDATION

## Brokerage Transfer Instructions (preferred option)

Notify brokerage house of intent to transfer stock to the:  
**WakeMed Foundation**

Instruct the brokerage house that your stock should go to the WakeMed Foundation brokerage account at:  
Wachovia **DTC 0141**  
WakeMed Foundation Brokerage Account number: **8991-7476**.

### ALSO, PLEASE INSTRUCT THE BROKER TO INDICATE THE DONOR OF THE STOCK GIFT.

After stock transfer, Wachovia will notify the Foundation within three days of sale. In turn, the Foundation will send appropriate notification and receipt to the donor.

## Donor Transfer Instructions

Request a Stock Power form from your bank or, if you prefer, sign the back of the stock.

Instruct the bank or brokerage institution that your stock should go to the WakeMed Foundation brokerage account at:  
Wachovia **DTC 0141**  
WakeMed Foundation Brokerage Account number: **8991-7476**.

The stock will be transferred and the Foundation will be notified of the gift. The Foundation will send the donor the appropriate notification and receipt.

**If you have any questions regarding stock gifts, please contact the Foundation office at (919) 350-7656.**

WakeMed Foundation is a charitable institution, (501) (c) (3), ID #56-1916549

So we may accurately note your gift, please complete the following information and return to WakeMed Foundation

Date: \_\_\_\_\_ Donor Name: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Certificate Enclosed       Brokerage Name (if selling through broker): \_\_\_\_\_

Name of stock: \_\_\_\_\_ No. of shares: \_\_\_\_\_

**Return to WakeMed Foundation, 3000 New Bern Avenue, Raleigh, NC 27610**