

How to Give Stock

Most people use stockbrokers, banks or other financial institutions to maintain their stock investments in an account. Stock can be quickly and easily transferred electronically from your account to the account maintained by **Midwest Palliative & Hospice CareCenter**.

However, to ensure that the transaction is processed accurately, we suggest that you follow the directions below to transfer gifts of stock from your brokerage account to ours.

1. Before the transfer, please call **Anne Rossiter, senior director of philanthropy, (847) 556-1605**.

OR

2. Call **Harris Investor Services, (877) 225-3863 (toll free)** and press 3 to inform them of the transfer. The account information is as follows:

Data Transfer Code (DTC#) 0443

Account # (NFA) NKV 001807

Account Name Midwest Palliative & Hospice CareCenter

If you select option #1 or #2, please inform Anne of the stock name, donor's name, and the brokerage firm from which the transfer is being made so the gift can be traced if necessary.

3. Instead of calling Harris Investor Services, feel free to complete the following form and **fax it to Harris Investors—(847) 808-7739**. ***Please be certain to the donor's name in the "comments" section of the electronic transfer screen.*** The form may be photocopied for future electronic gift transfers.

Please note that the **date of your gift** will be the date the shares are deposited into the CareCenter account with Harris Investor Services. The **value of your gift** will be the average of the high and low prices at which the stock traded on that date.

Donor Name:	_____
Stock Name:	_____
Number of Shares:	_____
Brokerage Firm:	_____
Date of Transfer:	_____

Transferring Stock Certificates

Some investors maintain possession of the actual stock certificates, and these also may be given. Since stock certificates are designed to be negotiable under certain circumstances, there are several steps that must be followed to safely and properly transfer ownership.

1. **Do not endorse the back of the stock certificate(s).**
2. Write a signed cover letter of instruction indicating the number and type of shares, the company and the purpose of your gift. Please include your phone number in case we have any questions. Send the cover letter and the unendorsed certificate(s) by certified mail, return receipt requested, to:

Anne Rossiter
Senior Director of Philanthropy
Midwest Palliative & Hospice CareCenter
2050 Claire Court
Glenview, IL 60025
3. In a separate first-class envelope, send to the same address a **stock power form for each certificate**, signed exactly as your name and the names of any others that appear on the front of the certificate(s). Stock power forms may be obtained from your bank or broker who needs to guarantee your signature on the stock power form(s).
4. The **date of the gift** will be the later of the two postmarks on the envelopes we receive. The **value of your gift** will be the average of the high and low prices at which the stock traded on that date.

If a stock certificate already has been endorsed, it is negotiable and should not be sent through the mail. In this case, please deliver it personally to the Finance Department:

Midwest Palliative & Hospice CareCenter
2050 Claire Court
Glenview, IL 60025

Contact Us

Call us if you need more information.

(847) 467-7423 or (800) 331-5484

TTY: (800) 526-0857

OR send an e-mail to arossiter@carecenter.org.