



Transfer Instructions for Making a Gift of Securities to Friends for Health in Haiti

Stock Transfers: Once a transfer has been completed please contact us and let us know. This is very important, especially if the gift has been transferred electronically to our account or a certificate has been issued in Friends for Health in Haiti's name, since your name will not be associated with your donation. We will provide you with an acknowledgment letter for your tax purposes and would like to say thank you personally. Below are directions for making transfers of stock:

❖ **DTC Transfer** – This is a convenient way to transfer your securities. Instruct your broker to electronically transfer your securities out of your account into Friends for Health in Haiti's *Raymond James* account. Your broker will need the following information:

Brokerage firm:	Raymond James
Account name:	Friends for Health in Haiti
Account number:	17690189
DTC number:	0725

❖ **Certificate Transfer** – Transferring your certificate can be as easy as endorsing the back of the certificate and sending it by certified mail to Friends for Health in Haiti. You must sign the certificate in front of a bank officer to obtain a Medallion Signature Guarantee (notary public stamps are not an acceptable guarantor for stock certificates). A medallion signature guarantee is required on all certificates. Be sure to endorse the certificate exactly as your name(s) appear on the front. For example, if your certificate is listed as "John P. and Mary F. Smith," you will need to sign the certificate exactly as "John P. Smith" and "Mary F. Smith."

Write Friends for Health in Haiti's **tax identification number, 20-4832316**, in the box on the back requesting a social security number or other identifying number of assignee. Mail it by certified mail to:

**Friends for Health in Haiti, Inc.
P.O. Box 122
Pewaukee, WI 53072**

Mutual Fund Transfers: Please call Friends for Health in Haiti at (262) 227-9581 or email us at friendsforhealth@gmail.com to find out how to transfer mutual funds.

Disclaimer: The information contained in this article is not intended as a substitute for wise tax counsel. We strongly recommend you consult with a professional tax advisor before making a gift of securities.