

Instructions for Gifting Stock Inova Health Foundation

Your broker can simply transfer the stock from your account to the Inova account, via electronic transfer. To do so, we suggest:

1. **Call/email/write** your broker to provide the following information:

DTC Number: 2669
Customer/Fund Name: Inova Health Foundation
Customer Account number: 26-60745
Bank: The Northern Trust Company
Attention: Attn: Mazen Khader
The Northern Trust Company
Corporate and Institutional Services
50 S. LaSalle Street, B-8
Chicago, IL 60603
Phone: 312-444-5032, Fax: 312-557-2673
Email: Mk328@ntrs.com

2. **Contact:** **Patricia Bowen**, Senior Philanthropy Officer, Inova Health Foundation
(571) 472-8069 or patricia.bowen@inova.org

OR

Fariha Bilal, Manager, Accounting Services
(571) 472- 8135 or fariha.bilal@inova.org

You or your broker must contact the Foundation or our accounting office before the stock transfer procedure begins. This is important because our broker must be notified and instructed to accept the gift in order for successful transfer. The information we will need from you or your broker is: type and name of stock you plan to transfer, the approximate number of shares and contact information for your broker and brokerage house.

3. **Send a follow up letter** to your broker (with a copy to the Inova Health Foundation office), which confirms your instructions. Attached is a letter with suggested copy.

Following your verbal instructions to your broker for an electronic transfer of securities, we encourage you to send a follow-up letter or email of instruction (sample copy below) and to forward a copy to the Inova Health Foundation office or cc: Patricia.Bowen@inova.org.

Date

Broker Name
Address
City/State/Zip

Dear _____ :

This letter is to inform you of my intention to make an irrevocable gift to the Inova Health Foundation. Please transfer _____ shares of _____ stock to the Inova Health Foundation which will benefit the _____ (indicate hospital, program or facility).

The information necessary to complete this transfer is as follows:

DTC Number:	2669
Customer/Fund Name:	Inova Health Foundation
Customer Account number:	26-60745
Bank:	The Northern Trust Company
	Attn: Mazen Khader
	Corporate and Institutional Services
	50 S. LaSalle Street, B-8
	Chicago, IL 60603
	Phone: 312-444-5032, Fax: 312-557-2673
	Email: Mk328@ntrs.com

Please do not begin the stock transfer procedure until you contact the Foundation's development office or accounting office. They will instruct Northern Trust Company to expect and accept the stock transfer. Please immediately call: Patricia Bowen, Senior Philanthropy Officer at: 571-472-8069, or Fariha Bilal, Manager, Accounting Services, Inova at: 571-472-8135.

I will forward a copy of this letter to the Inova Health Foundation so they too can be informed of the timing of this gift. This gift must be completed by _____ (date).

Thank you.

Sincerely,
(Your name)

cc: Patricia Bowen
Senior Philanthropy Officer
Inova Health Foundation
Attn: Gift Planning
8095 Innovation Park Drive
Fairfax, VA 22031
T | (571) 472-8069
patricia.bowen@inova.org

As of 11- 2022