



Inova Center for Personalized  
Health  
8095 Innovation Park Drive  
Fairfax, VA 22031

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**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: Melissa Serra**  
The Northern Trust Company  
Corporate and Institutional Services  
333 S. Wabash, WB-42 Chicago, IL 60604  
Phone: 312-444-3533, Fax: 312-557-2704  
Email: [mys34@ntrs.com](mailto:mys34@ntrs.com)

2. **Contact:** The Inova Health Foundation, 703-289-2072 or [Foundation@inova.org](mailto:Foundation@inova.org)

OR

**Russell Scott**, Financial Reporting Accountant  
[Russell.Scott@inova.org](mailto:Russell.Scott@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 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 email to [Foundation@inova.org](mailto:Foundation@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: Melissa Serra  
Corporate and Institutional Services  
333 S. Wabash, WB-42  
Chicago, IL 60604  
Phone: 312-444-3533  
Fax: 312-557-2704  
Email: [mys34@ntrs.com](mailto:mys34@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:*** Inova Health Foundation at 703-289-2072 or Russell Scott, Manager, Accounting Services, Inova at: [Russell.Scott@inova.org](mailto:Russell.Scott@inova.org).

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: Inova Health Foundation  
Attention: Gift Administration  
8095 Innovation Park Drive  
Fairfax, VA 22031