



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

**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

2. **Contact:** The Inova Health Foundation, 703-289-2072 or Foundation@inova.org

OR

Russell Scott, Financial Reporting Accountant
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



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

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.

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