



Gifts of Stock and other Securities to the South County Hospital Endowment

Thank you for considering a gift of appreciated securities to the SCH! To properly credit your gift, we ask that you notify the Development office, to let us know that a gift will be transferred. Due to privacy laws, gifts of securities may be transferred without a clear link to the name of the original donor. If we don't know that you are the donor, we cannot properly credit your gift, nor provide you with a gift receipt for tax purposes.

Step By Step Instructions:

1. Before initiating a gift, please contact Claudia Swain at (401) 788-1608. She will need to know the donor's name, the names of the securities that will be transferred, number of shares, and the anticipated date of transfer. It is helpful to know the Cusip Number of the stock and the DTC Participant # of the broker/ bank transferring the securities.
2. Notify your broker that you are making a gift of stock or bonds to South County Hospital Endowment. Instruct your broker to transfer the securities, if DTC-eligible, to South County Hospital's account at Citizens Bank. Your broker will need the following information:

Citizens Bank

Administrator: Kevin Mulvey
Phone: 401-282-4209
Fax: 401-282-5330
kevin.mulvey@citizensbank.com

Citizens Private Bank & Trust
10 Tripps Lane RTL125
Riverside, RI 02915

If Kevin is out of the office, email to: retirementplanservices@citizensbank.com

Please note Citizens Bank is not DTC direct, but clears through Bank of New York Mellon.

DTC #901 (Bank of NYMellon)
ID Agent Acct #101400 (Citizens Bank) f/f/c Acct# 1012906
ID Agent #80901

For gifts of Mutual funds

Contact Tom Napolitano at 401-282-3264

Please don't hesitate to Claudia Swain (401)788-1608 if you have any questions. Thank you!