



Thank you for your interest in donating stock to Fora Health. Shares can be transferred directly from your brokerage account to Fora Health and can offer significant tax advantages.

Please complete the form below and **send a signed copy to your broker as well as a copy to Fora Health's Development Office. Only your broker can initiate the transfer.** *NOTE: Some brokerage firms require this letter to be Notarized or Medallion Signature Guaranteed. Please check with your broker for additional requirements.*

**DONOR INFORMATION**

|                          |                    |                     |  |
|--------------------------|--------------------|---------------------|--|
| _____                    |                    | _____               |  |
| Donor Name(s)            |                    | Broker Name         |  |
| _____                    |                    | _____               |  |
| Donor Street Address     | City / State / Zip | Broker Company      |  |
| _____                    |                    | _____               |  |
| Donor Account #          |                    | Broker Phone Number |  |
| _____                    |                    |                     |  |
| Donor Phone Number/Email |                    |                     |  |

**FULFILLMENT INFORMATION**

Approximate Gift Value: \_\_\_\_\_

\_\_\_\_\_

(Name of Stock(s), Number of Shares)

Transfer Date:  Immediately  \_\_\_\_\_ (Date) to the account of **Fora Health** (Tax ID / EIN #93-0706892)

**DTC #: 0141**                      **Broker: Sharon Hidaka, Wells Fargo**  
**Account #: 44951281**         **Phone: 360-619-7307**

**GIFT DESIGNATION**

Fora Health's Area of Greatest Need      Fora Health Capital Building Campaign      This is fulfilling an existing pledge

**PUBLIC RECOGNITION**

Fora Health may publicly acknowledge my/our gift. How would you like to be \_\_\_\_\_  
 I would like to remain anonymous

**AGREEMENT**

My/our signature(s) serve as your authorization to complete the irrevocable transfer:

|           |      |           |      |
|-----------|------|-----------|------|
| _____     |      | _____     |      |
| Signature | Date | Signature | Date |

**It is important to notify Fora Health of this donation. Please email a copy of this form to [development@forahealth.org](mailto:development@forahealth.org).**

If you have questions or wish to make a gift of mutual funds, bonds, foreign or restricted stock, please contact Sarah Taylor at 503-535-1183 as these require special handling.

After Fora Health receives this form and our broker confirms the donation of securities, development staff will issue an official acknowledgment letter to the donor. For tax purposes, the value of the stock will be an average of the high and low prices on the date of transfer (also known as the gift date). The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules. All contributions are tax- deductible to the fullest extent provided by law. Every effort will be made to sell non-marketable securities as quickly as possible.