



**STOCK/BOND TRANSFER INSTRUCTIONS FOR GIFTS TO SUPPORT  
THE BAPTIST HOMES SOCIETY:**

**VIA WIRE TRANSFER:**

1. You or your broker should notify Baptist Homes Foundation [the Foundation] at 412-489-3502 of your intention to transfer securities to make the gift.
  
2. You or your broker should inform the Foundation as to the securities to be transferred, the number of shares, any restrictions requested for use of the gift and appropriate donor information to assure that the gift is properly received. The Foundation will provide transfer instructions at that time.
  
3. Your broker should then contact the Foundation's broker to verify the transfer information and indicate when the transfer will occur and obtain broker contact information.
  
4. Your broker should then transfer the aforementioned securities to the Baptist Homes Society Account.
  
5. Your broker should confirm with our broker that the transfer has been completed. [Please note that the gift is only completed when the transferred assets are physically in the Baptist Homes Society account, not necessarily the transfer date.]
  
6. You should receive a formal acknowledgement of the gift within two weeks of the date when the Baptist Homes Society receives the securities in its account.

**Note 1:** Baptist Homes Society broker-related questions should be directed to: Baptist Homes Foundation at 412-489-3502.

**Note 2:** Questions regarding securities to fund charitable trusts or other planned gifts should be directed to Erin Engel, Director of Development, Baptist Homes Foundation, 489 Castle Shannon Boulevard, Pittsburgh, PA 15234; 412-489-3502.



**STOCK/BOND TRANSFER INSTRUCTIONS FOR GIFTS TO SUPPORT  
THE BAPTIST HOMES SOCIETY:**

**VIA PHYSICAL DELIVERY**

The following is the procedure to physically deliver stock & bond certificates to the Baptist Homes Foundation:

1. Notify the Baptist Homes Foundation's Director of Development, Erin Engel at 412-489-3502 that you will be sending stock certificates as a gift to the Baptist Homes Foundation.
2. Send the physical certificates **UNSIGNED** via FedEx to:

Baptist Homes Foundation, Attn: Erin Engel  
489 Castle Shannon Boulevard  
Pittsburgh, PA 15234-1482

3. In a **SEPARATE** FedEx envelope, send the stock/bond power form (attached) to:

Baptist Homes Foundation, Attn: Erin Engel  
489 Castle Shannon Boulevard  
Pittsburgh, PA 15234-1482

This form does not need to be completed, it should only be signed by the donor. ***It is imperative that this is sent in a separate envelope for security reasons.*** Please make sure that the person who signs the stock/bond power form is the person to whom the certificate is registered. We also recommend that you keep a blank copy of the attached stock/bond power form on file should you need one in the future.

It is suggested that in one of these mailings, you include information pertaining to the gift, such as: purpose for the gift, if the gift is intended to fund a planned gift supported by the Baptist Homes Foundation, or any special recognition or naming opportunity associated with the gift.

4. Once the security is posted to our account, it is the policy of the Baptist Homes Foundation to sell the security within 24 hours so that the funds are available for their mission-related purpose. Baptist Homes Foundation reserves the right to hold securities if they are appropriate for inclusion in a Board-approved investment portfolio.

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# IRREVOCABLE STOCK OR BOND POWER

FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign and transfer unto

\_\_\_\_\_  
\_\_\_\_\_

(SOCIAL SECURITY OR TAXPAYER IDENTIFYING NO.)

**IF STOCK** \_\_\_\_\_ shares of the common stock of \_\_\_\_\_

**COMPLETE  
THIS PORTION**

represented by Certificate(s) No(s) \_\_\_\_\_ inclusive, standing in the name of the undersigned on the books of said Company.

**IF BONDS** \_\_\_\_\_ bonds of \_\_\_\_\_ in the principal

**COMPLETE  
THIS PORTION**

amount of \$ \_\_\_\_\_ No (s). \_\_\_\_\_ inclusive, standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint \_\_\_\_\_ attorney to transfer the said stock or bond(s), as the case may be, on the books of said Company, with full power of substitution in the premises.

Dated \_\_\_\_\_ (X) \_\_\_\_\_

\_\_\_\_\_  
WITNESS (X) \_\_\_\_\_