



<p><b>STOCK/BOND TRANSFER INSTRUCTIONS FOR GIFTS TO SUPPORT THE BAPTIST HOMES SOCIETY:</b></p>
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**VIA WIRE TRANSFER:**

1. You or your broker should notify Baptist Homes Foundation [the Foundation] at 412-489-3260 of your intention to transfer securities to make the gift.
  - 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.
  - Baptist Homes Foundation will then provide you/your broker with wire transfer instructions.
2. Your broker should confirm that the transfer has been completed. [Please note that the gift is only completed when the transferred assets are physically in the Baptist Homes Foundation account, not necessarily the transfer date.]
3. You should receive a formal acknowledgement of the gift within two weeks of the date when the Baptist Homes Foundation receives the securities in its account.
4. 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.

**Note 1:** Questions should be directed to Baptist Homes Foundation at 412-489-3260.

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



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**VIA PHYSICAL STOCK CERTIFICATES**

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

1. Notify Baptist Homes Foundation [the Foundation] at 412-489-3260 of your intention to transfer stock certificates as a gift to the Baptist Homes Foundation.
2. Next, contact the transfer agent that is assigned to the stock in question and ask for the necessary steps and paperwork to transfer ownership to Baptist Homes Foundation.
  - a. Then, you will need to re-register your physical certificate with the transfer agent who issued it. The transfer agent will then advise you on the next steps needed to complete the gift. Once the certificate is in Baptist Homes Foundation's name, Deutsche Bank (BHF's money manager) can handle depositing it into Depository Trust Company (DTC) for Baptist Homes Foundation.
3. *IMPORTANT NOTE: While some charities allow you to sign the back of a certificate and provide a stock power transferring ownership to the charity, Deutsche Bank handles physical certificates differently. They need to medallion guarantee the stock power before they can submit it to DTC/transfer agency. If you are not their client, they cannot perform the medallion guarantee.*
4. You should receive a formal acknowledgement of the gift within two weeks of the date that the securities are posted to Baptist Homes Foundation's account.
5. It is the policy of the Baptist Homes Foundation to sell the security within 24 hours so that the funds are available for its mission-related purpose. Baptist Homes Foundation reserves the right to hold securities if they are appropriate for inclusion in its Board-approved investment portfolio.

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