



**WILCOX HEALTH  
FOUNDATION**

An Affiliate of Hawai'i Pacific Health

## **Making a Gift of Securities**

Wilcox Health Foundation welcomes gifts of cash, but also encourages donors to consider gifts of securities. Often gifts of appreciated securities or stock can be one of the most advantageous ways to give.

### **Stock Transfer Instructions**

If you would like to transfer a gift of securities to Wilcox Health Foundation, please provide your broker with the following information. Your broker can then transfer the stock directly to the Foundation.

1. Please notify Wilcox Health Foundation (either you or your broker) by contacting Donna Masuda-Kam, Director of Accounting, at (808) 535-7355 or [DonnaMK@Kapiolani.org](mailto:DonnaMK@Kapiolani.org) to let her know that you wish to transfer securities and the purpose for which you want the funds to be used.
2. Your Broker will need the following information:

Wilcox Health Foundation  
Wilcox's Account Number 10104WF06  
Receiving Firm - First Hawaiian Bank  
**DTC #2039**

Our local stock broker is:

Ms. Jerelyn Brown  
First Hawaiian Bank - Institutional Funds  
P.O. Box 3708  
Honolulu, HI 96811  
Phone: (808) 525-5869  
Fax: (808) 525-7044  
Email: [jbrown@fhb.com](mailto:jbrown@fhb.com)

### **Information We Need From You**

We want to be sure that your gift is recorded correctly. It is very helpful for us to receive a note from you confirming your gift, your current address, and the purpose of the gift. Also, please include any other pertinent information such as if it is in memory or honor of an individual. And how you would like us to record your gift, for example, John Smith, Mr. & Mrs. John Smith, or John & Mary Smith.

### **Valuation and Acknowledgement of your Gift**

You will receive an acknowledgement letter from the Foundation with the closing price of the securities on the date of transfer along with a confirmation of the purpose for which the funds are to be used. It is our policy to liquidate any securities upon receipt.

For any questions or for more information on making a gift of securities please call the Foundation Office at (808) 535-7134 or e-mail Jeff Pederson, Director of Planned Giving at [Jeff.Pederson@kapiolani.org](mailto:Jeff.Pederson@kapiolani.org).