

Making a Gift of Securities

The Foundations of Hawai'i Pacific Health welcome gifts of cash, but also encourage 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 one of the Foundations of Hawai'i Pacific Health, please provide your broker with the following information:

1. Please notify Hawai'i Pacific Health (either you or your broker) by contacting Donna Masuda-Kam, Director of Accounting, at (808) 535-7355 or 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:

Kapi'olani Health Foundation

Kapi'olani's Account Number 10104KF01
Receiving Firm - First Hawaiian Bank
DTC #2039

Pali Momi Foundation

Pali Momi's Account Number 10104PMF01
Receiving Firm - First Hawaiian Bank
DTC #2039

Straub Foundation

Straub's Account Number 10104SF17
Receiving Firm - First Hawaiian Bank
DTC #2039

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

Information We Need From You

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, as well as how you would like us to record your gift for example, John Smith, Mr. & Mrs. John Smith, or John & Mary Smith.

Information We Need From You

You will receive an acknowledgement letter 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, please call 808-535-7134 or e-mail Jeff Pederson, Director of Planned Giving at Jeff.Pederson@kapiolani.org.