

## 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 Jessica Li, director of accounting, at 808-535-7355 or [chenwei.li@hawaiipacifichealth.org](mailto:chenwei.li@hawaiipacifichealth.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 #2663**

#### Pali Momi Foundation

Pali Momi's Account Number 10104PMF01  
Receiving Firm - First Hawaiian Bank  
**DTC #2663**

#### Straub Foundation

Straub's Account Number 10104SF17  
Receiving Firm - First Hawaiian Bank  
**DTC #2663**

#### Wilcox Health Foundation

Wilcox's Account Number 10104WF06  
Receiving Firm - First Hawaiian Bank  
**DTC #2663**

#### Our custodian is First Hawaiian Bank. Please contact:

Ms. Jerelyn Sullivan

First Hawaiian Bank - Institutional Advisory Services | PO Box 3708 | Honolulu, HI 96811

Phone: 808-525-5869 | Fax: 808-525-7044 | Email: [jsullivan@fhb.com](mailto:jsullivan@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.

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 808-535-7157 or email Amanda Price, director of annual giving at [Amanda.Price@HawaiiPacificHealth.org](mailto:Amanda.Price@HawaiiPacificHealth.org).