



Donating Stocks and Mutual Funds

Gifts of appreciated securities, such as stocks and mutual funds, that have been held for over a year are a wonderful way to support Piedmont while potentially realizing important benefits for yourself:

- Reduce or avoid paying capital gains tax
- Receive an income tax deduction for the full fair market value of the securities
- Rebalance your investment portfolio
- Electronic transfer from your bank or brokerage is easy!

How to Donate Stock

Instruct your broker to transfer shares to Piedmont Healthcare Foundation (Federal Tax ID: 58-1272768). Your broker should contact Beverly Glenn at SunTrust Bank by calling (404) 724-3556 or via email at beverly.glenn@suntrust.com.

For transfer of DTC eligible securities:

Participant Number: 2039
FFC SunTrust Bank a/c 11188
Account Number: 7942201

For transfer of physical securities*:

SunTrust Banks, Inc.
Free Movement, Mail Coded 3132
15th Floor, Suite 1520
303 Peachtree Street NE
Atlanta, GA 30308

*Please reference account #7942201 and Piedmont on the documentation accompanying the stock certificate(s).



How to Donate Mutual Funds

Contact your mutual fund company about the process of transferring mutual fund shares. A special form and signature guarantee will likely be required by them to initiate a charitable transfer. Contact Beverly Glenn at SunTrust Bank by calling (404) 724-3556 or via email at beverly.glenn@suntrust.com to complete the transfer. Because the process of transferring mutual funds typically takes 2-4 weeks, we recommend beginning end-of-year transfers in November.

How to Wire Cash

SunTrust Banks, Inc.

ABA 061000104

A/C 9088000038

Attn: Gift Clearing

In order to credit the gift to Piedmont, you must further reference account #7942201 and Piedmont.

Once your gift is made, please contact the Foundation to ensure proper crediting and designation of the gift:

Steven L. Dasher

Director of Major Gifts & Planned Giving

Piedmont Athens Regional Foundation

1199 Prince Avenue | Athens, GA 30606

Office: 706-475-3428 Mobile: 706-621-0992

Email: steven.dasher@piedmont.org

By donating appreciated securities, your generous contribution shows you care deeply about the people whose hearts and lives Piedmont Athens Regional touches every day. Thank you!