



## 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 Truist Bank by calling (404) 724-3556 or via email at [TruistBankGiftClearing@Truist.com](mailto:TruistBankGiftClearing@Truist.com).

**For transfer of DTC eligible securities:**

Participant Number: 2039  
SEI Private Trust  
Account Number: 7942201

**For transfer of physical securities\*:**

Truist Bank  
Physical Custody, Mail Coded 803-05-15-10  
303 Peachtree Street, NE  
15th Floor, Suite 1520  
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](mailto: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

### **Truist Bank**

Payee – Piedmont Healthcare Foundation

ABA - 061000104

A/C – 1000214910720

Swift Code for international donors – BRBTUS33

\*Please include donor name and any other identifying information in reference details. Once your gift is made, please contact PAR Foundation to ensure proper crediting and designation of the gift:

Steven L. Dasher

Executive Director

Piedmont Athens Regional Foundation

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Email: [steven.dasher@piedmont.org](mailto: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!

