



Process for Gifts of Securities

To make a gift of stock by using electronic stock transfer, please follow the two steps listed below. If you have questions, please call the Philanthropy Office at 717-558-7813.

Step 1 Please initiate a broker to broker transfer using the following information:

- Receiving Firm: The Foundation of the Pennsylvania Medical Society
- Receiving Account Title: The Foundation of the Pennsylvania
- DTC#: 0901
- Bank of NY
- Receiving Account Number: 092651
- Fulton Bank, NA, FFA Div Trust
- FFC: Foundation of PA Med
- Phone Number: 610-332-7140, Sheri Leo, Financial Advisor – Fulton Financial Advisors

For mutual funds, or for gifts of stock not held in a brokerage account, please contact the Financial Advisor listed above.

Step 2 Please notify the Foundation of the Pennsylvania Medical Society immediately about the transfer by completing the information below and emailing Lori Storm, Manager, Philanthropy & Hospital Relations at lstorm@pamedsoc.org.

Donor Name: _____

Donor Address: _____

Donor Phone Number: _____ Donor Email: _____

Signature: _____ Date: _____

Company Name of Stock Donated: _____

Number of Shares Donated: _____ Date Stock is to be Transferred: _____

Donor's Brokerage House: _____

Brokerage House Contact Name and Telephone Number: _____

Designation of Donation: _____

PLEASE NOTE: Notification of this donation is required to receive tax receipt.