

Gifts of Securities to Beth Israel Deaconess Hospital-Plymouth

Donating stock to Beth Israel Deaconess Hospital-Plymouth (BID-Plymouth) represents a tax-wise charitable giving opportunity. By contributing stock that has grown in value over time to the Hospital, you avoid capital-gains tax and receive a charitable income tax deduction based on the stock's fair market value.

1. If your securities are held in book-entry by a broker or bank:

Please notify the Philanthropy office by phone (508-830-2420) or email (philanthropy@bidplymouth.org) and inform us of the name and quantity of the securities being contributed.

It is important for us to know a day or so before the transfer will take place, so we can contact our broker, Gage-Wiley & Co., Inc. They will then be able to verify receipt of your shares promptly and BID-Plymouth can acknowledge your gift in a timely manner.

The information your broker will need is:

Gage-Wiley & Company, Inc.
120 King Street
Northampton, MA 01060
Attention: Michelle Borawski
Telephone: 413-584-9121
Toll free: 800-332-9558
Fax: 413-585-5748
Email: mborawski@gagewiley.com
Account # 2888-2579 (Beth Israel Deaconess Hospital-Plymouth)
DTC # 141 (First Clearing Corporation)

2. If you hold security in certificate form:

If the securities you wish to donate are currently in certificate form, please call Michelle Borawski at Gage-Wiley (413-584-9121) for assistance in gifting stock held in certificate form. It is very important that transfers of physical certificates are processed in a specific manner to avoid delays in completing your gift.

Please do not re-register the shares in the name of BID-Plymouth or any of its affiliates. The transfer will be authorized by a letter of instructions signed by the registered owners listed on the certificate. Michelle Borawski will prepare the letter for you.

3. If you wish to give Mutual Fund Shares:

Please call Michelle Borawski at Gage-Wiley (413-584-9121) for assistance in gifting. Shares of most mutual funds can be transferred directly into the BID-Plymouth brokerage account. The process is a bit different than as described for book-entry shares and may take 3-4 weeks to accomplish. Michelle Borawski at Gage-Wiley will provide you with the necessary form.

*For answers to other questions about stock transfers, please call
the Philanthropy Office at Beth Israel Deaconess Hospital-Plymouth at (508) 830-2420.*

Thank you for supporting BID-Plymouth!