



UPSTATE FOUNDATION

## Electronic Transfer of Securities

### DTC Instructions:

Credit: **Prisma Health – Upstate Foundation**

Broker: **USBank**

Participant Number: **2803**

Agent Internal Number: **5002649-003**

\*please send all information exactly as written, including the dash

Thank you for making a gift of securities to the Prisma Health–Upstate Foundation. To allow us to thank you for your generous donation, and to provide you with the necessary documentation for income tax purposes, please provide us with the following information:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Do you wish to remain anonymous? (*Circle one*) YES / NO

Restriction on gift (Endowment, Program, Service, etc.):

\_\_\_\_\_

Company name of securities transferred: \_\_\_\_\_

Number of shares: \_\_\_\_\_ Approximate date of transfer \_\_\_\_\_

Name of sending broker/financial institution: \_\_\_\_\_

Sending institution primary contact information:

Name: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Once you have completed the above information and transferred the securities, please email, or mail this form to:

Cynthia Ford, Manager, Foundation Operations & Finance  
Prisma Health–Upstate Foundation  
300 E McBee Avenue, Suite 401  
Greenville, SC 29601-2898  
Office: (864) 797-7744  
Email: [Cynthia.Ford@prismahealth.org](mailto:Cynthia.Ford@prismahealth.org)