



Creating a world without heart and vascular disease

Donor Procedures For Gifting Stocks or Securities

Thank you for choosing to make a gift of stock to MHIF! Please electronically transfer, or have your broker electronically transfer, stock into MHIF's UBS Financial Services account.

Andy Kiernan, broker

MHIF's brokerage account: #RP05512 and DTC #0221

Address:

UBS

681 Lake Street East, Suite 354

Wayzata, MN 55391-1758

Please call Laurie Knutson at 952-475-9460 if you need more information or assistance from UBS.

Please note: If you have an actual stock certificate, please *do not* have it transferred to the Foundation's name. Instead, please state your desire to transfer securities to the Foundation as follows: "I, John Doe, do hereby gift to the Minneapolis Heart Institute Foundation, a registered Minnesota 501(c)(3) not for profit organization, [number of shares] of [stock name]." List the certificate numbers and the number of shares per certificate and include this disclaimer: "These certificates are contributed without restriction." Sign and date the letter.

Your tax benefit is the average of the high and low of the security on the day the transfer is made or, if it arrives by mail, the postmark on the envelope is the date of the gift.